


Our Global Charter

We exist to...




- Help our partners succeed to their fullest potential
- Fuel partner growth across OPG with our scaled expertise
- Represent and inspire the mid-market voice

So that we can...



- Onboard, educate and grow our partners' digital revenue worldwide
- Invest in and continue to develop an open web and apps ecosystem
- Fund great content

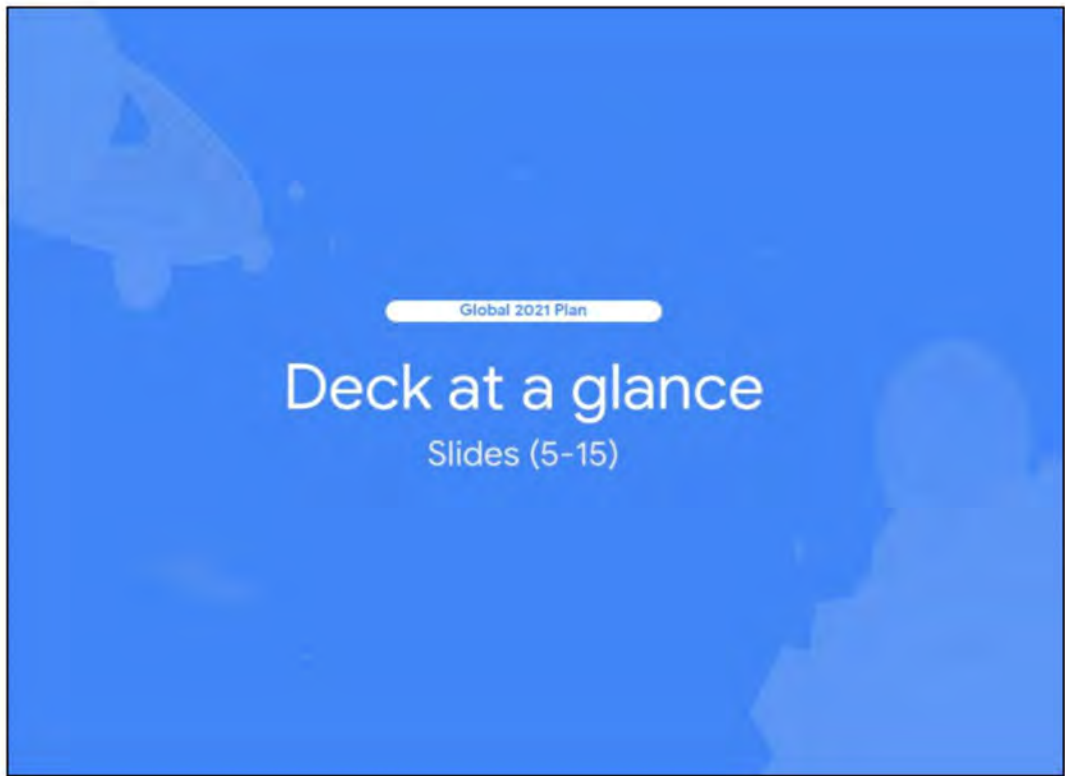
Because we believe...



- Our partners fuel innovation, productivity, and future growth
- Scale is king and drives big impact for our partners
- SMBs stimulate the market economy and create jobs in all kinds of communities

Google




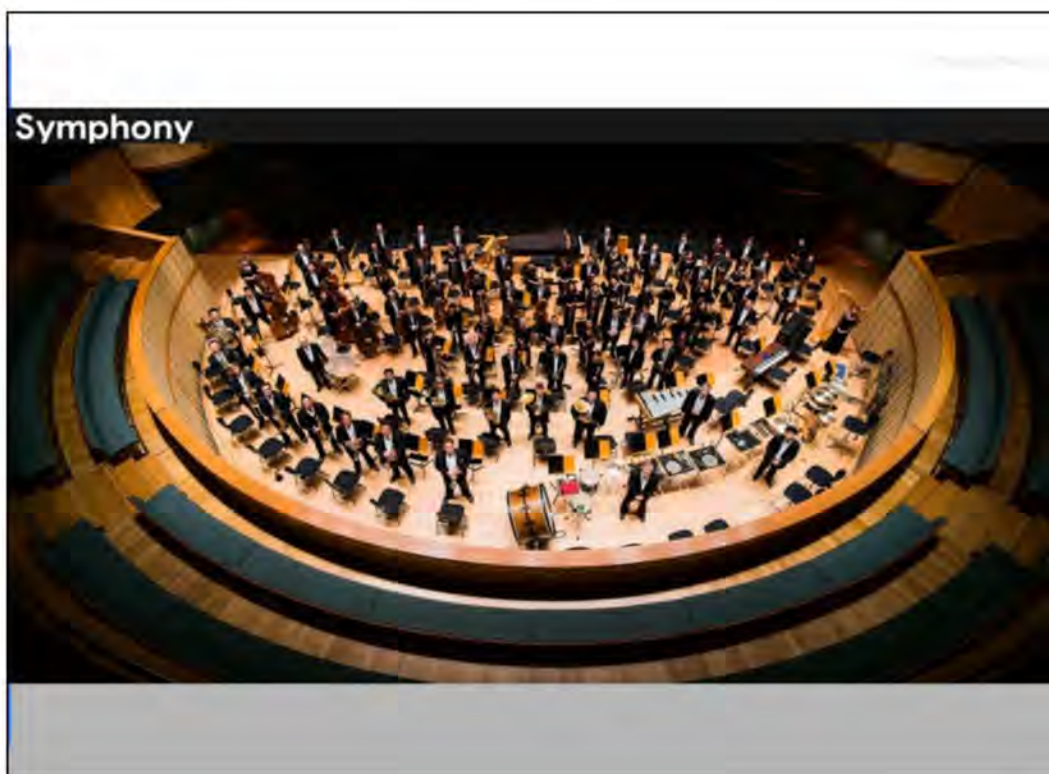


Executive Summary

Our Goals	<ul style="list-style-type: none">● SMBP revenue is expected to hit █████ in 2021, marking +12% YoY growth● SMBP inventory is projected at 6.4T; 4.5% y/y (*tbc)● Apps is expected to grow at +10% YoY, while Web is projected to grow by +13% YoY● New Acquisitions is expected to drive █████ clean revenue in 2021 (*tbc)
The Plan	<ul style="list-style-type: none">● "Symphony" Strategy: Bringing together the best of teams to drive focus areas with speed, intelligence and scale while extracting maximum ROI from BAU operations with continued efficiency gains from automation and improvements in core capabilities● Core Execution remains critical to achieve OPG goals: As the secret sauce for Scale, teams will double down to drive operational excellence via coordinated sales, automation and increased collaboration as one SMBP in order to deliver BAU goals most efficiently● Focus Areas are key to achieving growth for OPG: Teams need to innovate & collaborate, driving key results relentlessly & delivering 24% of the total incremental revenue● Partner Centricity remains at the heart of delivering the best of Google to our partners; PX champions efforts across OPG to provide best-in-class service to our partners● People<ul style="list-style-type: none">○ Enable teams to be business owners, grow skills and enrich career experiences○ Leverage expertise in key areas: acquisitions, marketing, partner support, and scalable sales opportunity growth to drive productivity and key business results

* data can be found [here](#)

Continued on Previous



What unifies Global SMBP?

4 sub-functions x 4 regions

Shifting demands to have a centralized approach to an in-region approach: confusing and challenging

At the same time, let's remember that someone else in the world probably has the answer to the business problem we're solving for; Has the expertise to get things done
The collective capabilities and perspectives we have on this call should give us hope that as long as we're committed to stay on a common course, we will get there
Why Symphony?

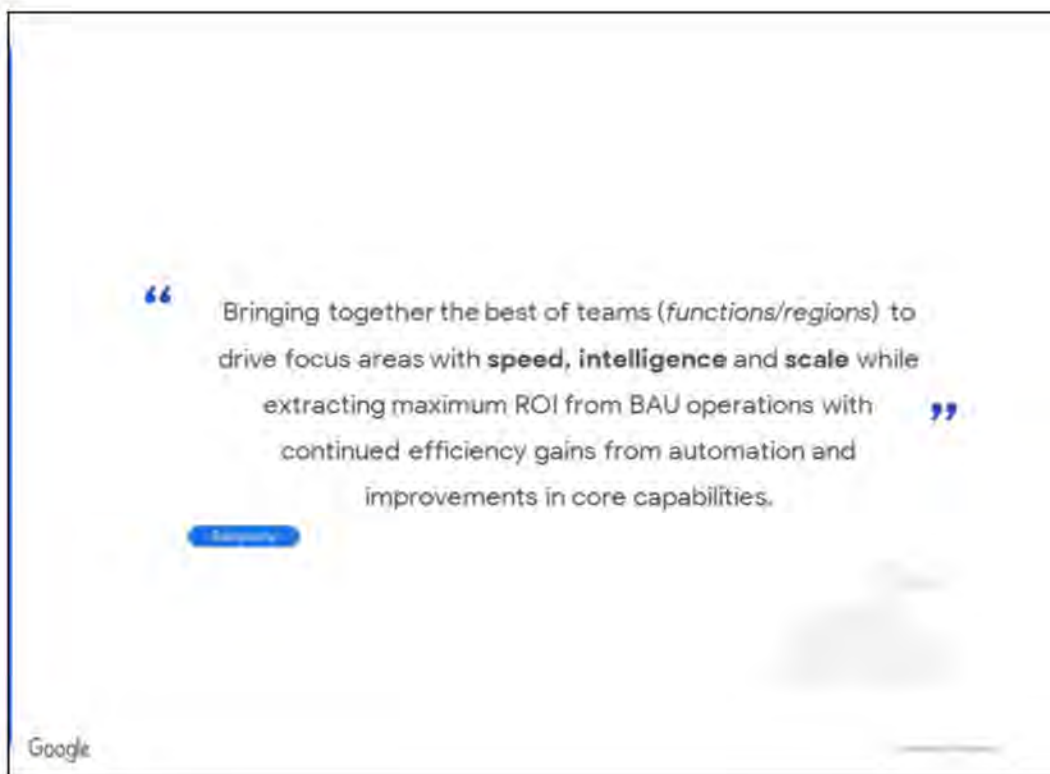
A large ensemble - Work usually consisting of multiple distinct sections

Consists of a string section (violin, viola, cello, and double bass), brass, woodwind, and percussion instruments, which altogether number about 30 to 100 musicians

Each section plays, drums, strums to their parts to produce the best musical compositions

Likewise, each region and function makes their own music but brings the best to the global stage when opportune to play a piece together

At times, the violinists play solos; at other times, it's just the beat of the drums > so how we as conductors nurture the individual teams to serve as the centrepiece in that moment?



- Taking on scale in a much bigger way
- Plans need to be worked out more requiring more rigorous research, more delegation, and a greater focus on team alignment and clear metrics
- So by the outcome we want is few clear focus areas that unify this global team that we commit to driving performance for
- In essence, embrace our diverse skills and perspectives, nurture it, cheer one another on.... But we pick few but critical areas to drive performance in a concerted effort

Symphony 2021: Our Commitments

- 1 SMBP regional/functional teams will drive performance under OPG 2021 Pillars anchored by our guiding principles of speed, intelligence and scale.
- 2 We continue to support region-first or function-first new initiatives with a clear mindset of scaling across the wider organization. We aim to sustain agility and accommodate market nuances.
- 3 We set goals, and we pursue them relentlessly.
- 4 We get better as a global organization when we share, learn and replicate best practices.



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Our **Guiding Principles**: How we will work towards our success?

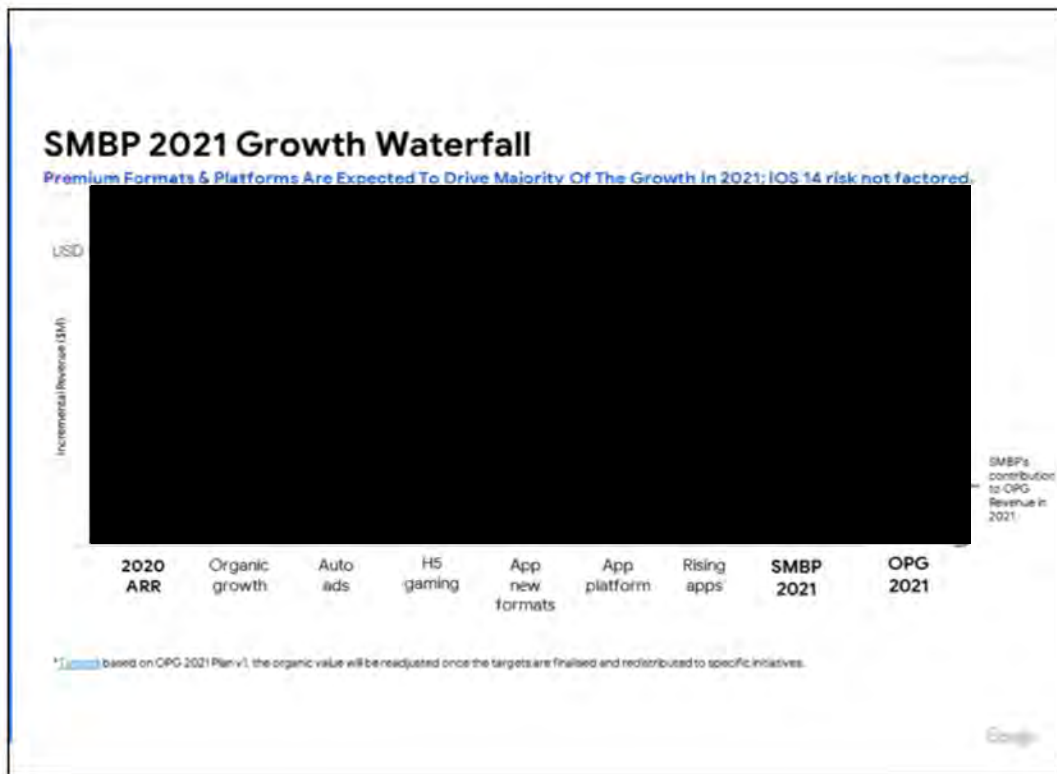
SPEED	INTELLIGENCE	SCALE
Improve processes/workflows to do things faster, better and more collaboratively to support our partners.	Leverage data Intelligence to drive efficiency with automation, relevant opportunity identification, and prioritization of key initiatives	Do more with less and continue to iterate on understanding our customers as well as revising our plans based on their evolving needs to grow their business
<p>Examples:</p> <ul style="list-style-type: none"> ● Operational Excellence ● Smart Journeys ● Chatbot ● Automation Case Agent ● HC Alert Signals ● Troubleshooter 	<p>Examples:</p> <ul style="list-style-type: none"> ● Data Infrastructure Integrity ● Machine Learning ● Multi-Touch ● Budget Attribution ● Automated BOB ● Account-based marketing 	<p>Examples:</p> <ul style="list-style-type: none"> ● Webinars/Office Hours ● Video Project ● Account Based Marketing ● Pub Voice ● Reachability ● PDR

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Feedback from Scott.

We need amplify/highlight quality as alternative to better in the speed section.



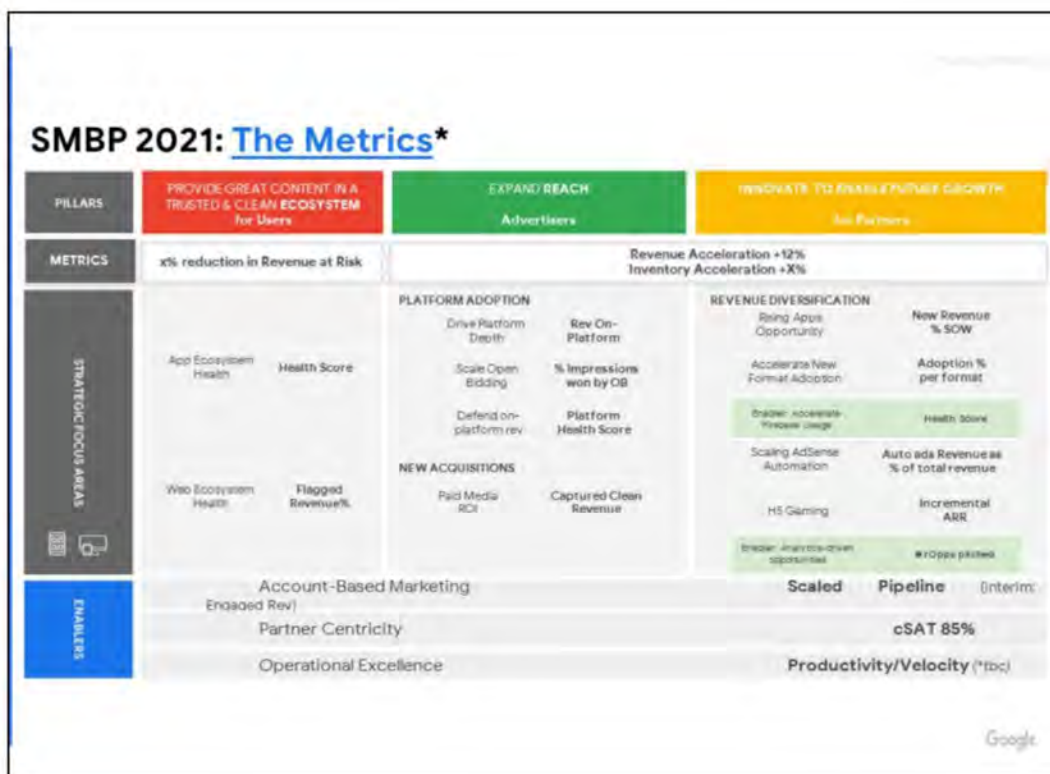


Account-Based Marketing:

Acquire ABM Prospects w Nurture: Implement targeted nurture campaigns through targeted content, emails, webinars and events to increase ABM sign up rate

Multi-Touch: Refers to the close integration and deliberate timing of scaled and 1:1 pitches to drive efficiency and implementations

Scale For OPG: SMS expanded our menu of services and scope beyond email into video & online events, and beyond SMBP to drive upper funnel awareness and less complex optimizations to partners across the entire OPG to T1, CPT



***ALL NUMBERS TO BE FINALIZED.**

2021 Scalable Acquisition Plan			
2020 Learnings		2021 Priorities	2021 OKRs
Best practices/pilots that can scale globally? <ul style="list-style-type: none"> ● ABM strategy on web works. We validated that prospects that we know about are good for business. For example in our initial campaigns we've seen higher ARPUs, \$260 vs \$13 for standard sign-up and 95% of clean revenue comes from sign-ups we know about. Scaling this to AdMob in 2021 is a priority. ● Focused SEM budgets work better. Shifting budget from low ROI markets to high-performing ones and focusing on spending in few key markets helps drive increases in account net ROI. Removing brand keywords from high volume campaigns also ensures that budget is spent on incremental sign-ups. ● Closely working with product & T&S helps reduce dirty revenue. Dirty revenue declined 74% Y/Y thanks to work on site eligibility classifier & project guardian. 		ABM Nurture Program <ul style="list-style-type: none"> ● Development of a nurture path containing content, email drip campaigns, events, webinars & events. Focused on driving marketing qualified leads. 	MQL % Sign ups & \$42M ARR
		Whole Acceleration program <ul style="list-style-type: none"> ● SA/SEM/ISO collaboration to drive ad format: implementation of HiPo Apps via SMS MPR campaigns and 1:1 touch. Utilizing monthly webinar to drive product adoption and ecosystem health. 	\$11M ARR
		DEI <ul style="list-style-type: none"> ● Exceed Google DEI benchmarks for our marketing materials by increasing representation across our comms, ads, case studies and panels. 	Benchmark TBC
The big questions leading into 2021 <ul style="list-style-type: none"> ● How to increase ABM impact. We see ~1% sign up rate from scaled campaigns to ABM prospects when offering the sign-up messaging. We want to find out if building longer term relationships with higher quality content delivers higher sign-up rates. ● Increasing ABM coverage. As we exhaust our internal channels for reaching prospects how to do we continue to find high quality external channels where we are confident of reaching our exact target audience. ● Can we grow whales with targeted scaled pilotives. SA is activating less clean whales this year than last and App activated whales are smaller than 2019. If we use pitches focused on ad format adoption and encourage app portfolio expansion. 		Top Asks <p>[AdSense marketing budget] Current budget [REDACTED] is small comparative to product size which limits campaign scope as current budget used to keep lights on ex(SMS email). LinkedIn campaign [REDACTED] deprioritized in CPEX, not approved by marketing) and in progress with Scott for H2 next year.</p> <p>[SEM Budget] Approval for [REDACTED] per budget to continue. Our SEM campaigns have a restricted spend of \$10K per country unless we commit to spend cash on our campaigns. If we spend 5% of our budget on cash we can get 95% of our budget free. If we don't spend we lose \$11.4M ARR.</p> <p>[AdMob Affiliate in NBU Countries] Would like SMBP support on X budget to run AdMob NBU campaign</p> <p>[DEI] Help with translations to ensure the language is correct and appropriate.</p>	

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2021 Scalable Marketing Solutions Plan			
2020 Learnings		2021 Priorities	2021 OKRs
Best practices/pilots that can scale globally? <ul style="list-style-type: none"> ● Scalable comms program manager: Drive alignment on webinar topics and scaled content strategy across channels for global CPG with improved proactiveness of our internal CoE processes to build trust with our stakeholders. ● Multi-touch: Close integration and deliberate timing of scaled and 1:1 pitches drive more implementations and efficiency. ● Smarter revenue attribution and reporting: Continue to drive <u>further improvements</u> in global SMS revenue attribution by aligning implementation and revenue methodology with Connect Sales. Improve reporting in <u>go-to-market</u> provide greater enhancement and serve as the backbone CPG <u>data decisions</u>. 		New Growth <ul style="list-style-type: none"> ● Expand inventory with new ad formats and accelerate Finance/Analytics adoption/usage via scaled comms across channels. ● Refine scalable comms messaging to address objections and focus on publishers' needs. 	Implementation rate
		Account-based marketing <ul style="list-style-type: none"> ● Personalized comms at scale to serve the right targeted content for partners at the right time via the right channels. ● Process & infrastructure to support ABM model: multi-touch CRM, signals, content personalization. 	Rev. engaged CMA?
		Platform <ul style="list-style-type: none"> ● Apply scaled comms strategy to support C&B and mediation optimization. ● Vast: optimize account health score at scale. 	On-platform revenue
The big questions leading into 2021 <ul style="list-style-type: none"> ● [Expand CoE & ABM sustainability] As SMS is expanding across different channels, it is important for us to develop solid processes and structure to support the entire CPG across regions/products in a balanced and equitable way. This requires a deep understanding of clients' ROI and prioritization principles to allow us to make the right decision and leverage our resources in the right way. ● [Balancing internal strategy with external trends] External market forces and dynamics (super apps, declining web) will affect the priorities and the way we build our scaled comms strategy. It's important to balance between optimizing our internal strategy & ops while listening to external partners' insights and market trends to evolve our scaled comms strategy. 		Top Asks <p>[Shared OKR & Plan with Product & Mktg] Multi-touch approach requires tightening alignment and deeper collaboration with stakeholders upstream and downstream to ensure the smooth execution and sequential flow of events.</p> <p>[RPT support on revenue attribution] Formulating a methodology (is how to assign revenue across ~2-3 touchpoints) as well as aligning with Connect Sales (and OneSMBP Pipeline and Hawks Eye by extension) is no small undertaking. Given the emphasis on scale moving into 2021, therefore, we request additional support on accurately measuring scale.</p> <p>[Online event TVCs] TVC support for event management in AMS/APAC to handle registrations, email comms, event setup, etc.</p>	

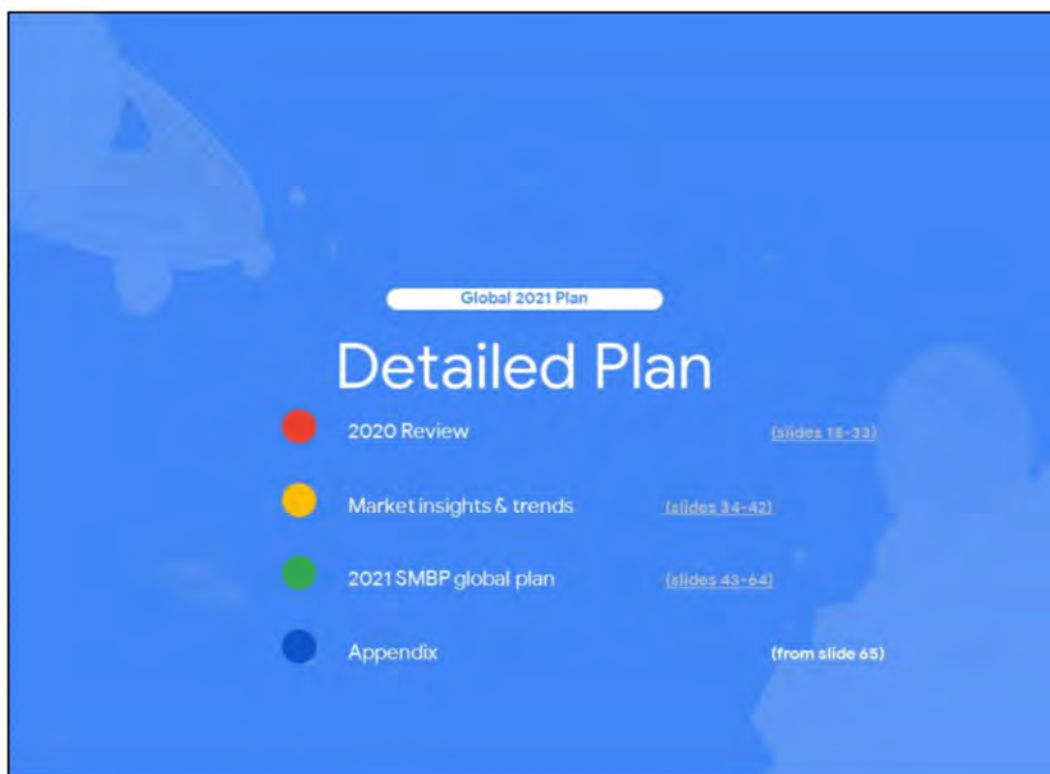
Google

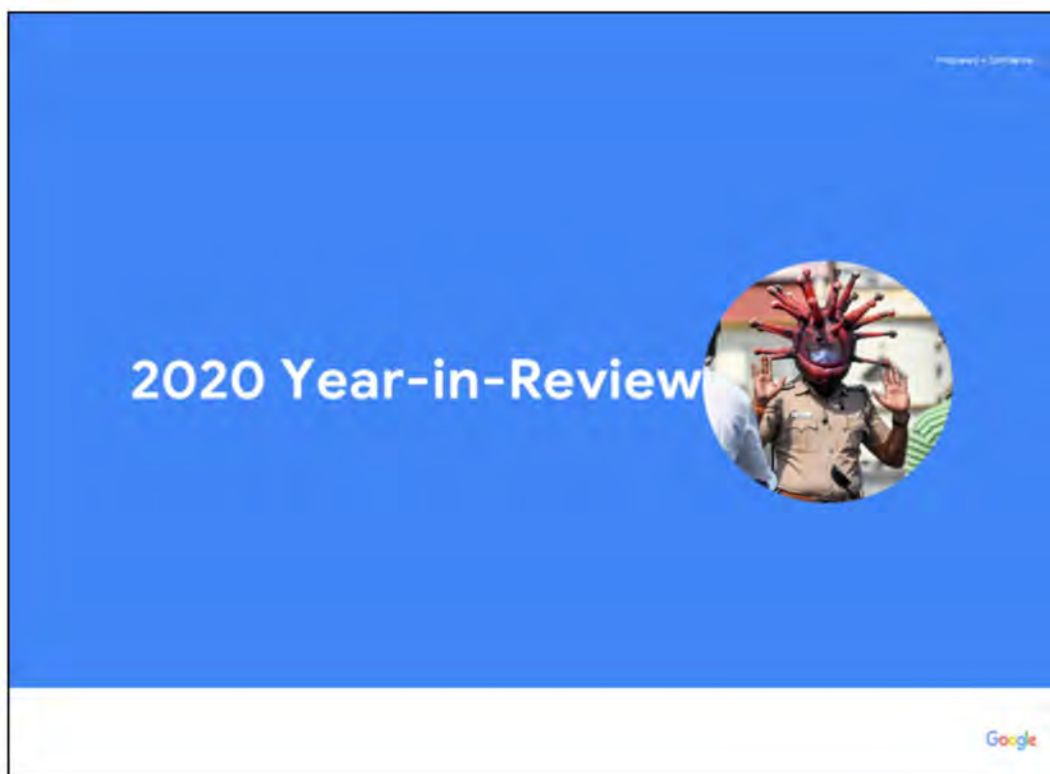
2021 A-Team Plan			
2020 Learnings		2021 Priorities	2021 OKRs
Best practices/pilots that can scale globally? <ul style="list-style-type: none"> [Multi-touch]: Doubling down as one SMBP team where A-team members will unlock the opportunity via coordinated sales, minimizing 1:1 efforts on low complex opportunities (solving for unified messaging to the customer, efficiency, signal improvement) [Implemented DV]: A-team is pivoting to track IDVARR as a key metric globally to further accelerate OE: global A-team pilots hosted in 2020 did prove that the team has been able to close higher IDV QoQ while focusing on an always-on approach by combining 1:1 pitches and scaled activities in collaboration with XFN teams 		New Growth <ul style="list-style-type: none"> Expand inventory with new ad formats: [REDACTED] not Opt that we aim to close in 2021 via coordinated multi-touch sales approach Enablers: Finances/mercis 	Adoption to format
		Account based marketing <ul style="list-style-type: none"> Incorporate market feedback to increase relevance of adspace (omni and higher adoption, sales via scalable channels) Unified messaging via multi-touch approach 	low, low engagement optimization
		Platform <ul style="list-style-type: none"> Self serve model to drive OE adoption across desktop, mobile apps, to high-touch support resources for top apps Retention as a key pillar driver via scale 	On-platform new to OE engagement
The big questions leading into 2021 <ul style="list-style-type: none"> [Web Extract remaining ops via scale]: Double down on scaled initiatives to maximize the opportunity focused on sustaining revenue and increasing reach, minimum high touch impact only on top rev deals and Ad Manager optimization. Does focusing primarily on scale to extract the remaining opp on web lead to any potential risk? [Prioritization based on complexity]: As A-team has a strategic focus on going deeper on initiatives such as using app and platforms for top partners as well as drive new format adoption via scale, it is critical for A-team AMs to maximize key opp. via scale so as to deploy resources into high touch support for complex opps. 		Top Asks <p>[Support on Scale tracking]: Given the emphasis on scale moving into 2021, we request additional support on accurately measuring the impact of all scaled activities hosted by A-team: global consistency in methodology, attribution to the pitch source, only event, event + follow up from sales team so as to make better informed decisions on where scale could solve to free resourcing</p> <p>[Expansion of PDR support]: Opportunity to increase engagement with high opportunity and low engagement SMB publishers prior to transitioning responsive publishers to AMs, possible solutions include automation and TVC support</p>	

Google

2021 Partner Experience Plan			
2020 Learnings		2021 Priorities	2021 OKRs
<p>Best practices/pilots that can scale globally?</p> <ul style="list-style-type: none"> • [Quality Assurance Program] Ensured the operational excellence for all 1:1 interactions with publishers with +80% quality score from all regions. • [Site Approvals - Cases Automation] Automated workflow will take care of all BRITA volumes and save PX approximately 400 working hours of doing BRITA cases or 1 FTE per quarter. Extension to AdSpam issues. • [Top Goggles] Scaled campaigns targeted for contribution to cleaner ecosystem health in 2020, positioning to expand to other key topics in 2021. • [Chatbot Launch] Expansion to other languages based on WeChat pilot launch. • [Shortlist & Highlight] Unlocking opportunities for pitches in Cases implemented in Q3 and \$540k in Q4. 		New Growth	<ul style="list-style-type: none"> • PX key pillar - Proactive Partner Enablement Bring unique PX knowledge to drive partner growth across CPG. Extending support by proactive identification and outreach to deliver timely resolution to drive partner growth.
		Account Based Marketing	<ul style="list-style-type: none"> • PX key pillar - Platform Experience Enhancement Improve self-solvability of our scalable support platforms by improved program management and enhanced collateral. Ensure that they can be used as the primary point of contact for publishers.
		Platforms	<ul style="list-style-type: none"> • PX key pillar - Automation & Efficiency Gain deeper publisher insights and leverage data analytics to automate processes that provide better and faster outcomes for publishers and release FTE resources.
<p>The big questions leading into 2021</p> <ul style="list-style-type: none"> • [Tier 5 Centralization] Development of guiding principles and risk assessment. • [PX Subject Matter Expert] Scoping and clear definition of expectations for SME in PX teams. • [Community Forum] Should we invest in ensuring that the community forum medium is suited to support scalable efforts. (Pilot launch in Poland) 		<p>Top Asks</p> <p>[Shared OKRs with Product Team] Alignment between Product and CPG PX with shared OKRs and product roadmap for Q1 Publisher experience enhancement 2] Problem solving</p> <p>[Privacy and Regulation, Ecosystem] GTM PSL commits support and actionable guidelines to the cases from increased Regulations in User Privacy Policies, Ecosystem internal and external changes.</p>	

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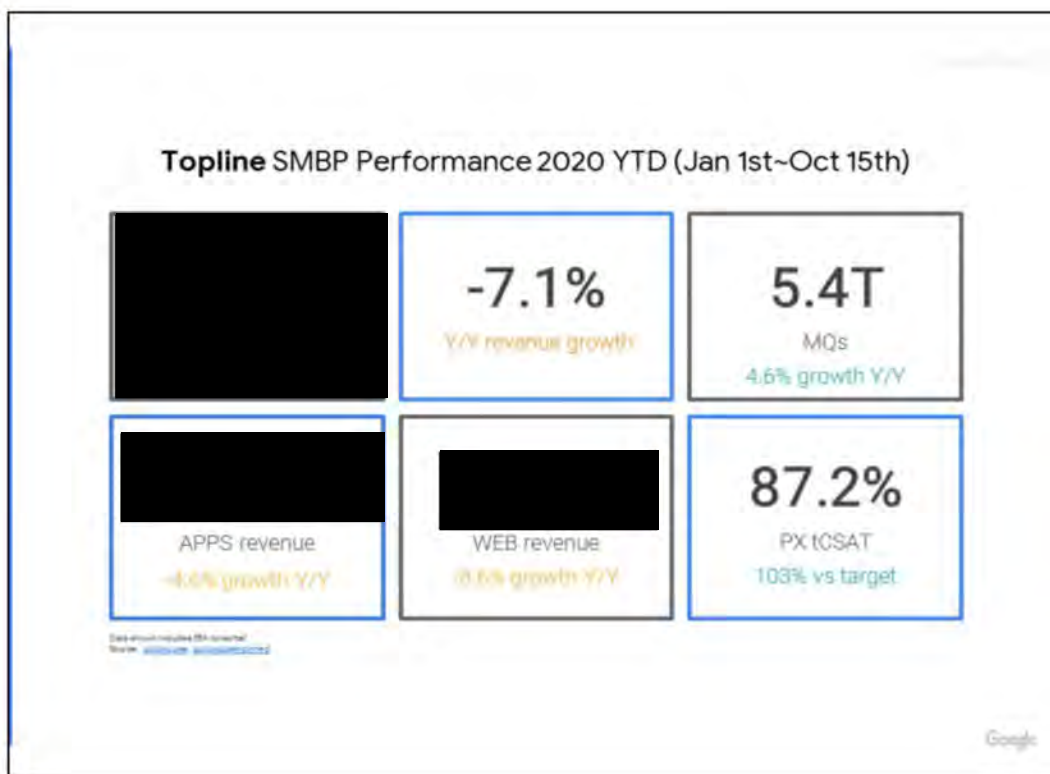




“ There are decades where **nothing** happens, and there are weeks when **decades** happen. ”

— Lenin —







For **apps**, we saw a major decline in **CPC**. Queries decline was likely affected by **Throttling** and higher **policy** termination this year

T3-H represents lower bins, i.e. T3 to T5.
Capex between Jan-Mar-Q423H compared vs prior year



Similarly, for **web** we see a **decline** in CPC, however we see very positive growth in page views

T3-4 represents lower tiers, i.e. T3 to T8.
Casts between Jan 1st–Oct 27th, compiled without year



Lamotte

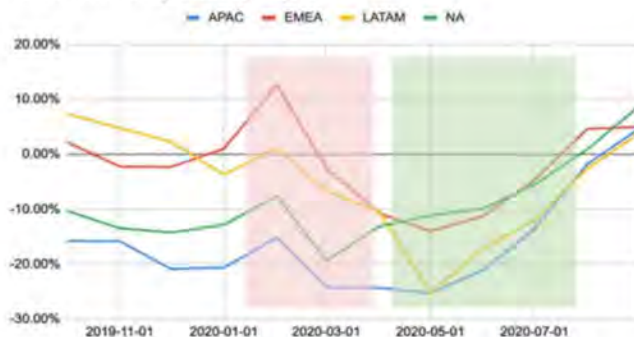


- In 2018, SMBP pitched 9.5k pubs for 52k offerings*

Id	Date	Text
1	12/16/2020 06:15:12	thanks Niamh. Keyvan is OOO. Is there someone who can help update the numbers please?
1	12/16/2020 10:31:11	I understand the data points here but I don't think it's an accurate representation to show the figures like this, a decline 175M in samestore is not the same as taking in 64M less in acquisitions. I think Y/Y growth is more representative if you want to compare like with like here.
1	12/16/2020 10:31:11	@waynewong@google.com - Could you please help here if possible?

Growth dropped post COVID and **bottomed** around May; growth **accelerated** since then and in Q3 passed previous year levels

Torso revenue growth by region



Google

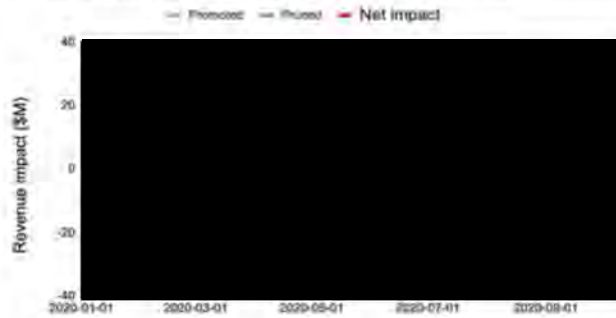
Clean inventory **accelerating** since beginning of last year; There was some deceleration post covid which was **recovered** in Q3

Clean inventory growth across products



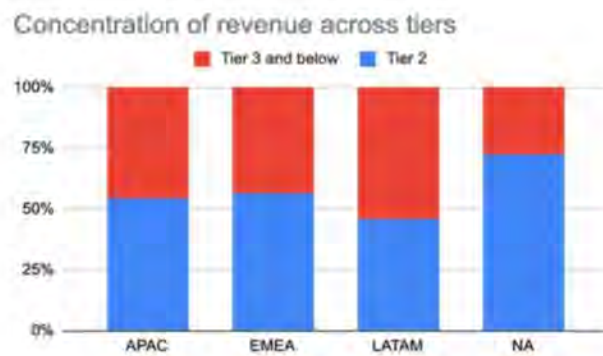
Both **promoted** and **pruned** accounts **grew** in terms of **revenue** in 2020; the net impact of promotion/pruning has been **negative** for SMBP as promoted accounts are larger.

Impact of 2020 promotions/pruning on SMBP revenue



Id	Date	Text
2	12/16/2020 06:17:47	For relatively, what are the pruned and promoted amounts as % of total SMBP rev? (Out of curiosity on my part - if this isn't easily available don't worry)
2	12/16/2020 06:17:47	@keyvann@google.com to follow up

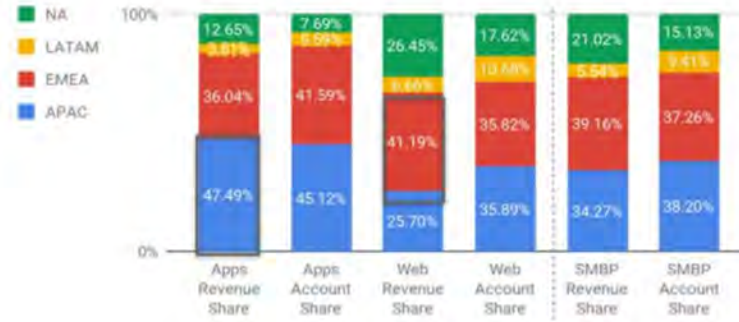
Revenue well distributed in high and low tiers; share of revenue in **lower tiers** rather **high** in APAC and LATAM



Apps revenue is concentrated in APAC and web concentrated in EMEA

Global Account and Revenue Distribution

Account and Revenue Concentration - YTD



Google

Revenue is **less concentrated** on the top for **APAC** and **EMEA**, these regions seem to have relatively **higher SMS opt in** compared to NA



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Implementations drove ██████ in incremental growth; The top 3 implementations were Auto Ads, Interstitials, and AdMob Rewarded Demand, which contributed to **54%** of in-year deal value

→ In 2020 YTD, SMBP implemented 3.8k offerings for ██████ uplift spread across 2k SMBP publishers* compared to 4.2k implemented offerings and ██████ uplift in 2019 YTD

→ 28% of Implemented Deal value globally sits in Auto Ads implementations

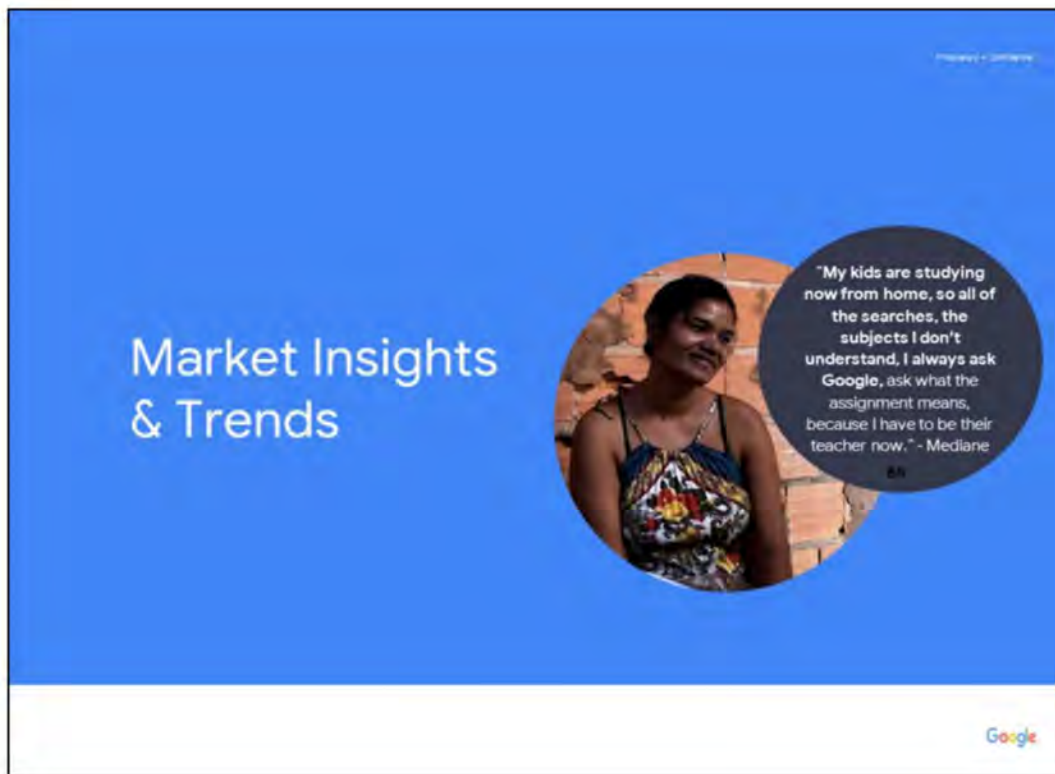
In-year Deal Value of Top 10 Implementations (\$, millions)



Key Learnings From 2020

1. **Global SMBP growth is driven by apps** across all regions except APAC, which was impacted by policy clean up in GRCN.
2. **Strong growth in clean revenue** is leading to a high confidence in the sustainability of the business.
3. **Lower tiers were disproportionately impacted** by COVID across apps and web.
4. **Combining 1:1 and scaled interactions improved close rates.** Also validating increased investment in digital events, social and video outreach.
5. **ML improved acquisition lead qualification** by 2.8x and saves 90% scrubbing hours to find HIPO leads.

Google



Spotlight Story • Dora from Mexico

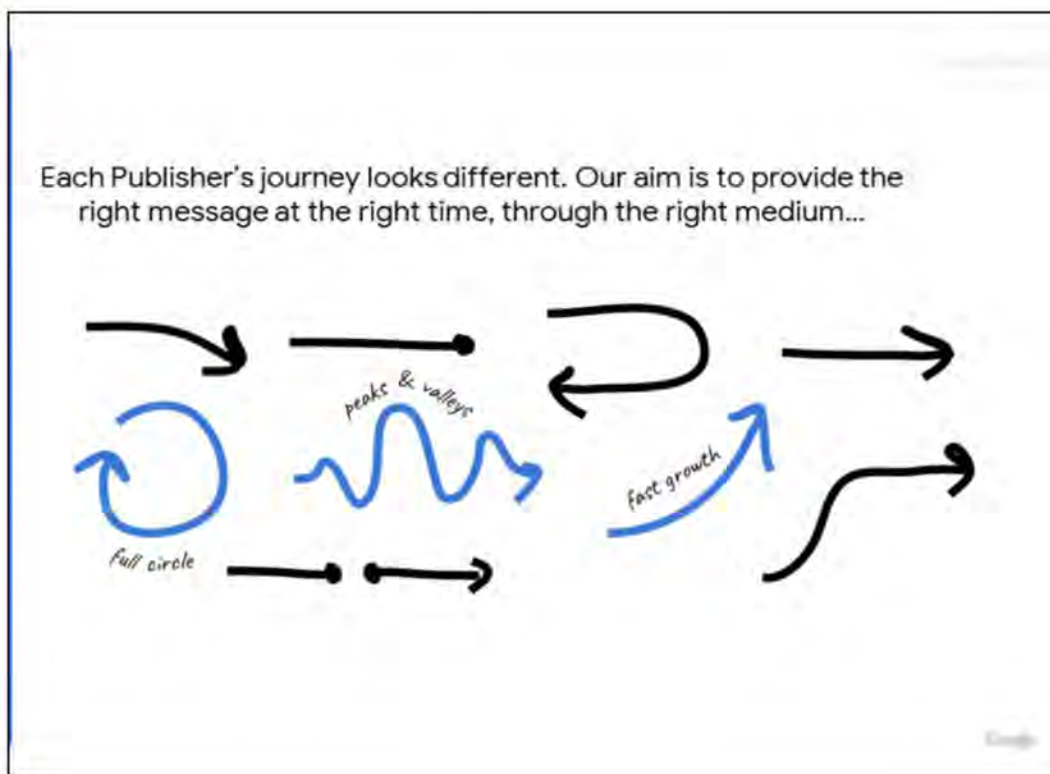
Pre-COVID: Used most of her data to keep up with friends on WhatsApp and check Facebook.

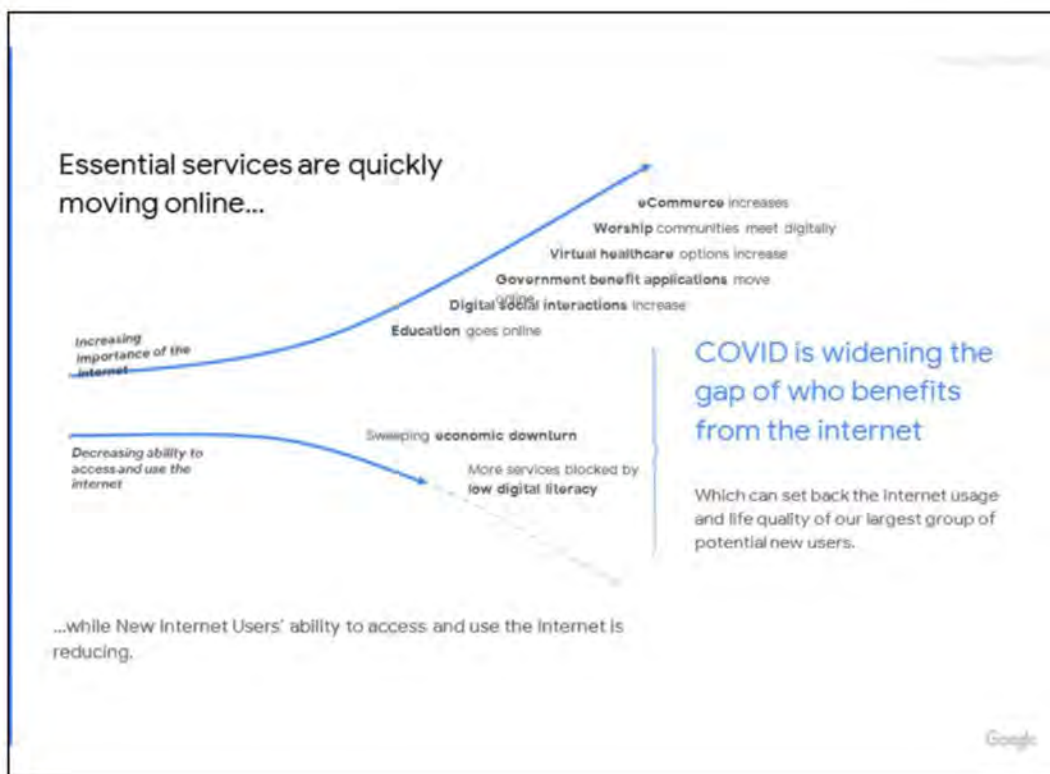
Post-COVID: Has been struggling to conserve and top-up her mobile data since she lost her job due to COVID. She's prioritizing the little data she can afford towards her daughter's schooling (which has transitioned to WhatsApp). Dora's daughter is the now the primary phone user.

We heard similar stories from NIUs in other countries.

"Well now people talk through the internet and the phone. I get calls every day, I get video calls...But when I do many video calls...then it uses all the internet and the internet runs out." - Cristielen, Brazil

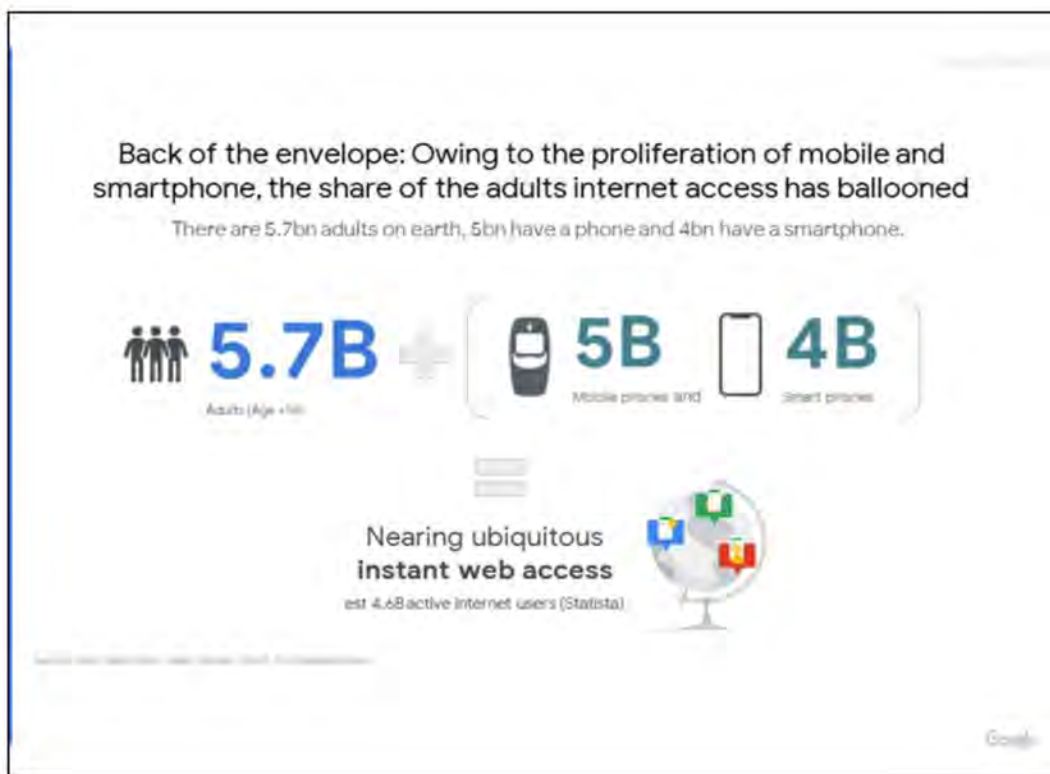


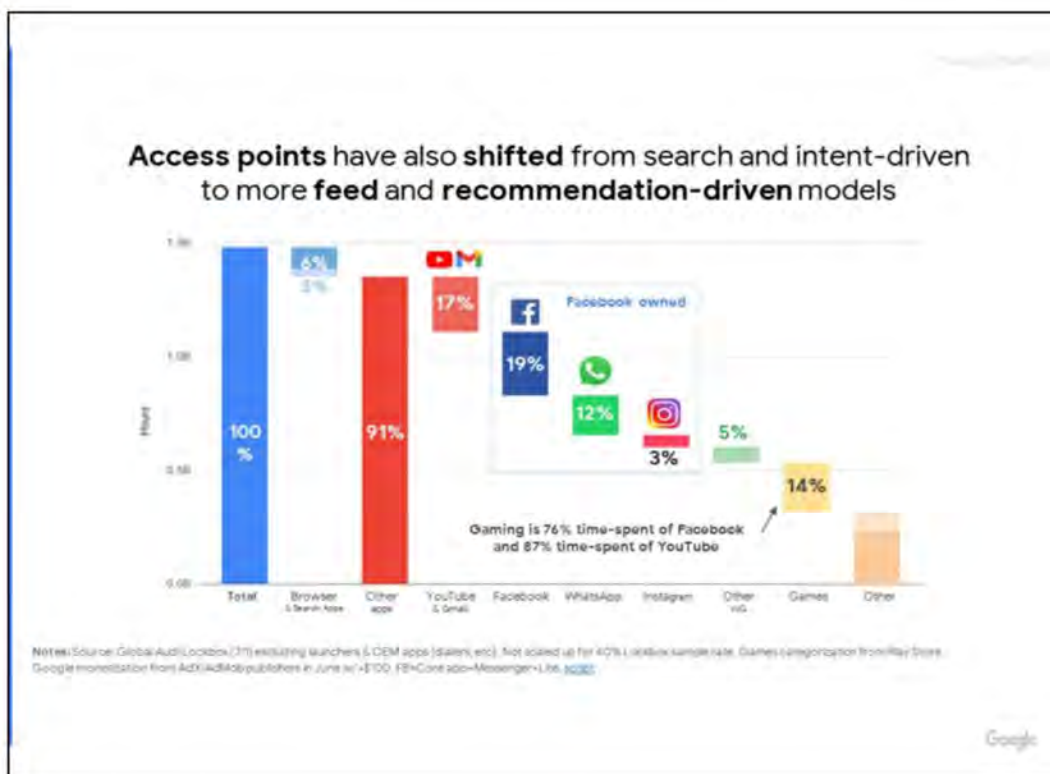




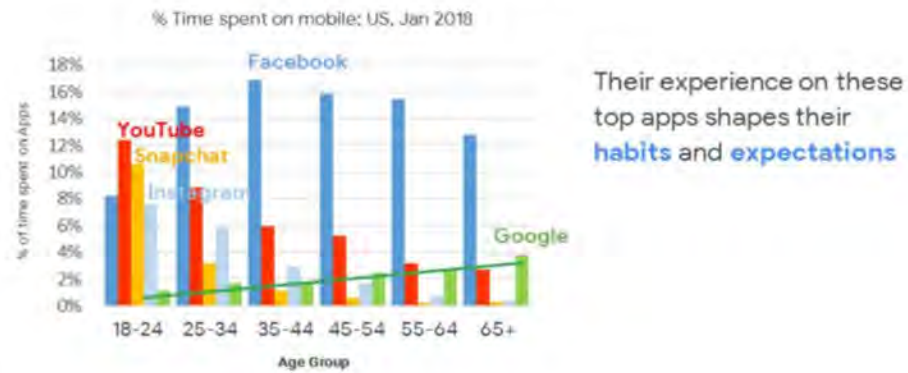


Add notes to this slide



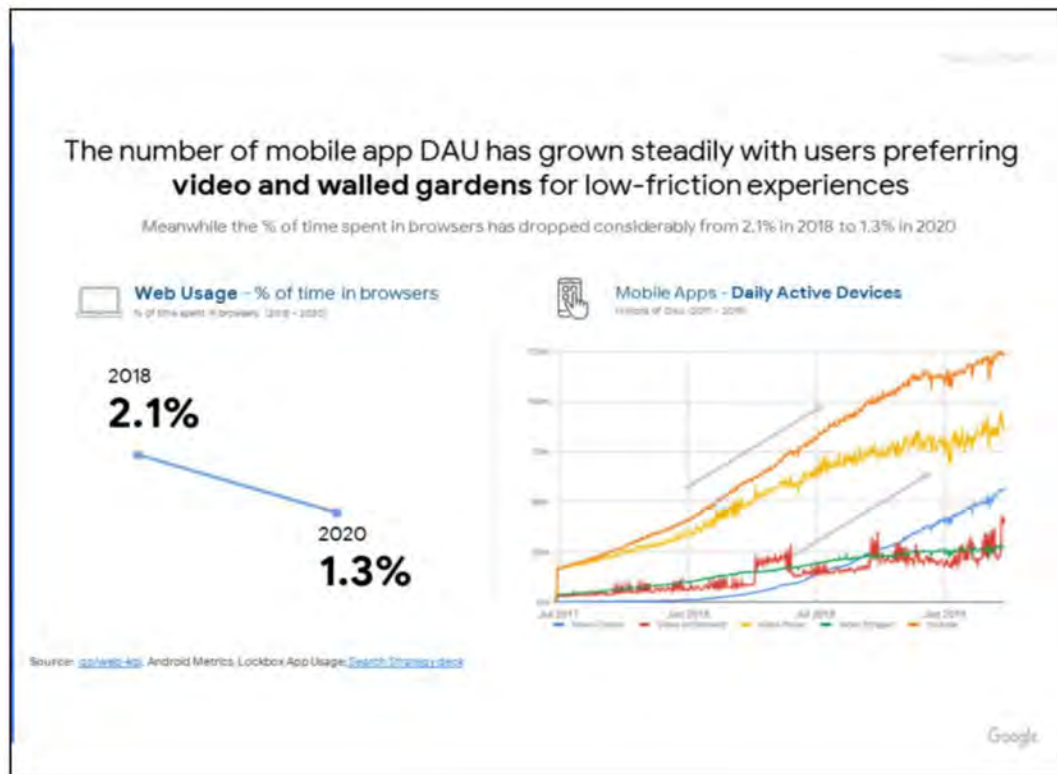


YouTube, Snapchat, and Instagram are where US 18-24 mobile users spend their time



Their experience on these top apps shapes their habits and expectations

Google





Spotlight Story • Alfonso from Mexico

Pre-COVID: Struggled to find stable jobs but ad-hoc jobs always turned up.

Post-COVID: Lost his job at a restaurant when COVID hit. Ad-hoc jobs like carpentry help put food on the table, but have become scarce. Recharging mobile data is stretching the limits of his reduced income. Alfonso has been conserving cell phone data by prioritizing emergency calls and lowering food costs with price-comparison shopping.

We heard similar stories from NIUs in other countries:

"[I] had planned to go the 42km back [to my village]. The price of vegetables and other essentials are cheaper [there], and there are no jobs in the city." - Mikhail, India.



***ALL NUMBERS TO BE FINALIZED.**

Target Trix: https://docs.google.com/spreadsheets/d/1bj2l31_v7-Fab-bW300a-33mEQijXtw6RSe8h21nHGM/edit#gid=499158272



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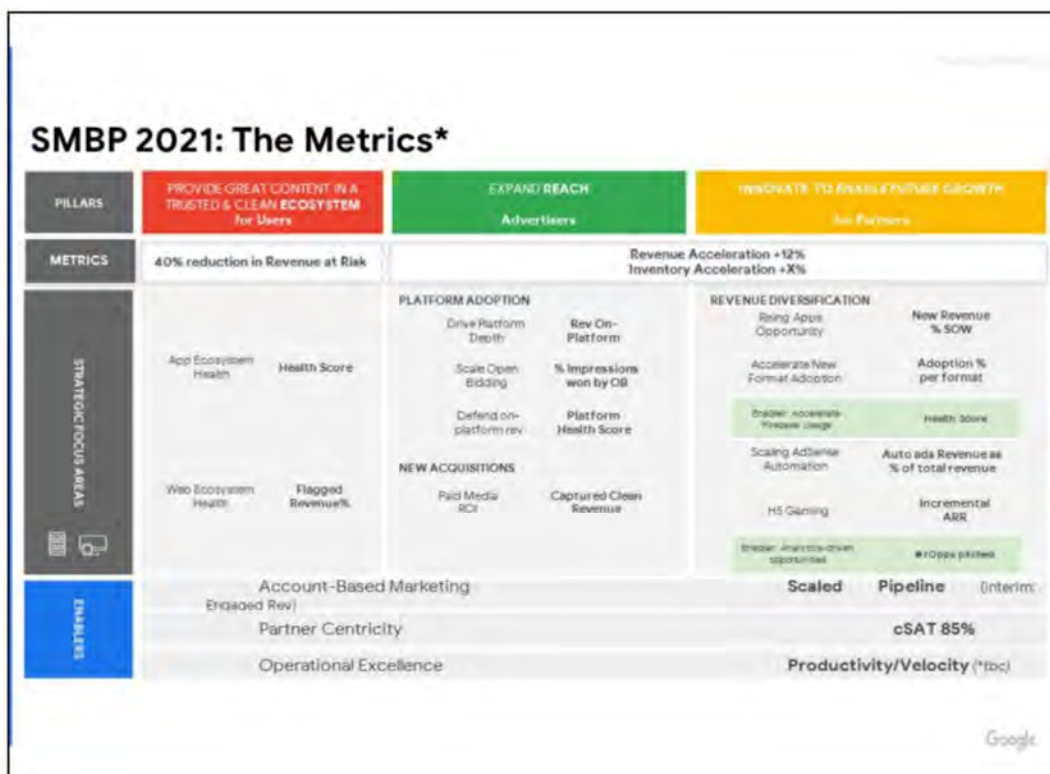


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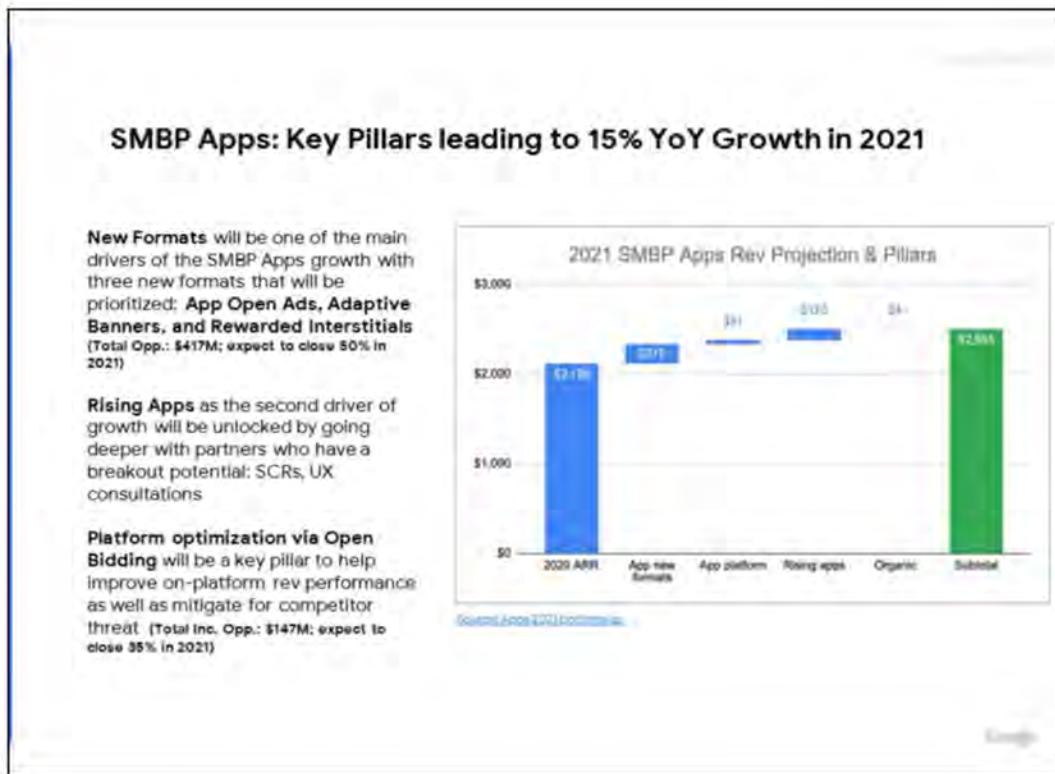
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Functional/Product 2020 Plans

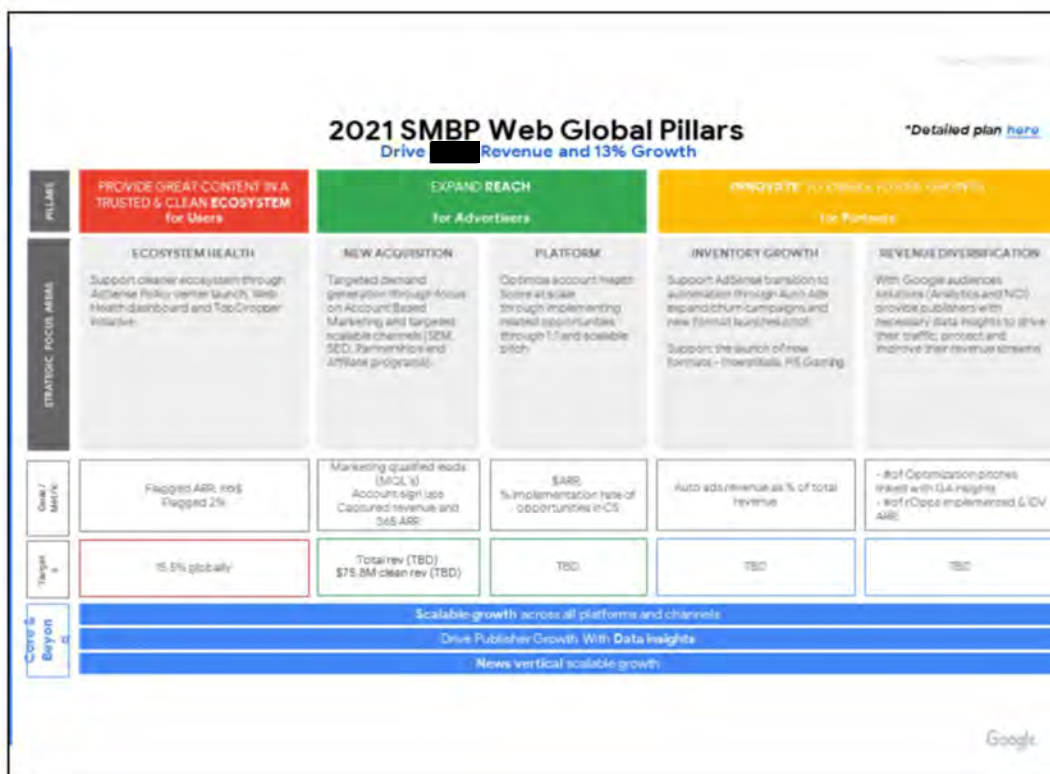
TEAM	DETAILS	OWNER(S)
Scaled Acquisition	Attract and acquire quality creators, build a healthy and engaged ecosystem.	sdunleavy@
Scalable Communications	OPG's leading Center of Excellence for all things scaled.	vanvuong@
A-Team	Shifting gears (1:1 vs scale) to accelerate partner growth through our three superpowers: adaptability, agility, and flexibility.	prateekbajaj@
Partner Experience	Move forward to create effortless support environment that empower partners and sustain excellent user experience.	seolkichoi@ and vitalyporukov@
SMBP Apps Plan	Grow new partners, formats and the platform.	prateekbajaj@
SMBP Web Plan	Pivoting web business to scale.	darynach@
NBU @ SMBP	Google must build for NBU markets in order to sustain long term growth in users and revenue.	sballestero@

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2021 SMBP Apps Global Focus Areas					
Drive █████ in revenue & 15% y/y growth in 2021					
*Detailed plan HERE					
Initiative*	PROVIDE GREAT CONTENT IN A TRUSTED & CLEAN ECOSYSTEM for Users	EXPAND REACH for Advertisers		INNOVATE TO ENABLE FUTURE GROWTH for Publishers	
Strategy	ECOSYSTEM HEALTH <ul style="list-style-type: none"> -Adoption of ecosystem health score: flag potential or existing revenue declines based on ecosystem related issues - Partner adoption on actionable pillars: approval linkage, IOS 14 mitigation, Sellers join, confirmed click; adoption of the pillars leading to high confidence in the ecosystem 	ACQUISITION <ul style="list-style-type: none"> -Clean signups: Paid Media, external partnerships and Events to drive AdMob Signups -Activation & acceleration: ML leads for early detection, nurture and grow: HiPos and Whales 	PLATFORM <ul style="list-style-type: none"> -Win on the top: OB as primary pillar to increase on-platform revenue depth % (ATS X A-team) -Retention: On-platform features; platform health score 	NEW FORMATS <ul style="list-style-type: none"> -Scalable co-ordinated sales: opp for new inventory and unified message across all functions RISING APPS <ul style="list-style-type: none"> -Extended support: SCRS, inventory expansion, platform, UX consultation 	FIREBASE <ul style="list-style-type: none"> -Firebase linking & drive rev through data driven decision with Firebase recipe and scalable sales campaign -Drive additional revenue via better Firebase usage; partner segmentation based on maturity stage
Metrics**	Ecosystem Health-Scorecard Flagged rev at risk %	Rev Clean Rev Clean Activations	Rev on platform % Impressions on OB	New formats: % of apps Rising Apps: Rev growth, Impl. rate, % SCW	% linked rev Firebase Adoption Score
Target	TBD	\$X app rev (TBD) \$X clean rev (TBD)	TBD	TBD	TBD
SMBP CORE CAPABILITIES: SIMPLICITY, SCALE, SPEED					
*: Check SMBP Apps Working Group POC HERE **: Metrics in bold text has official ok set; metrics non bolded only has forecast number					
<div>Google</div> <div>Confidential - Proprietary</div>					



Source: <https://docs.google.com/spreadsheets/d/1yaUTxa747i0DaNP0h8QBLFyIfx-FKIE7N3DTJiQLCo0/edit?resourcekey=0-qosmMuHzdTvC7KMwkAe5Dw#gid=1944865193>



OPG 2021 Pillar Survey: https://docs.google.com/document/d/1fCpW2Sx4tKBMLczY-t6Bgcu-kSlpfO7P0SsBjt2z-_M/edit?ts=5f087b9f#

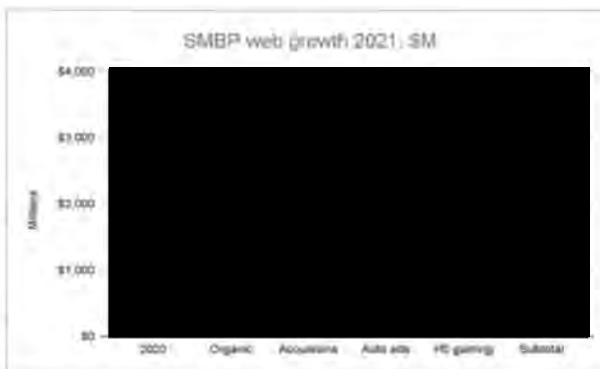
SMBP Web 2021 plans

SMBP Web expect 13% growth in 2021

Acquisition will be one of the main drivers of SMBP Web growth accounting for xx% of growth.

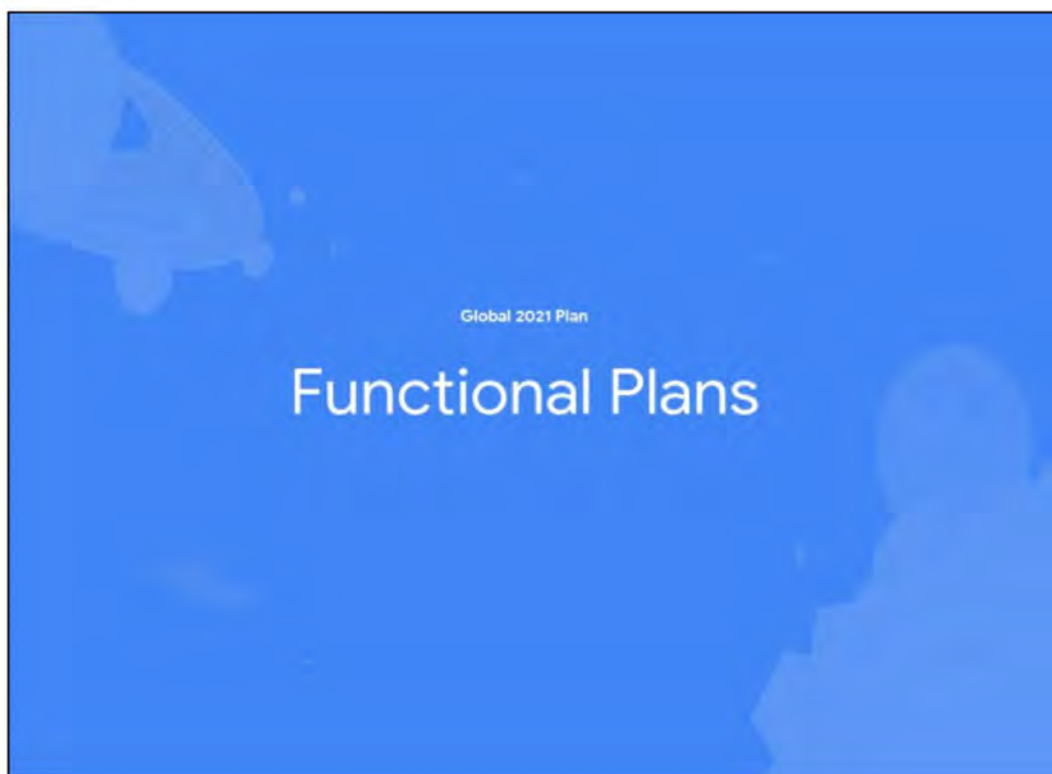
Auto ads as the second driver of growth will be delivered by Auto optimize feature launch as well as product optimisations and new feature launches.

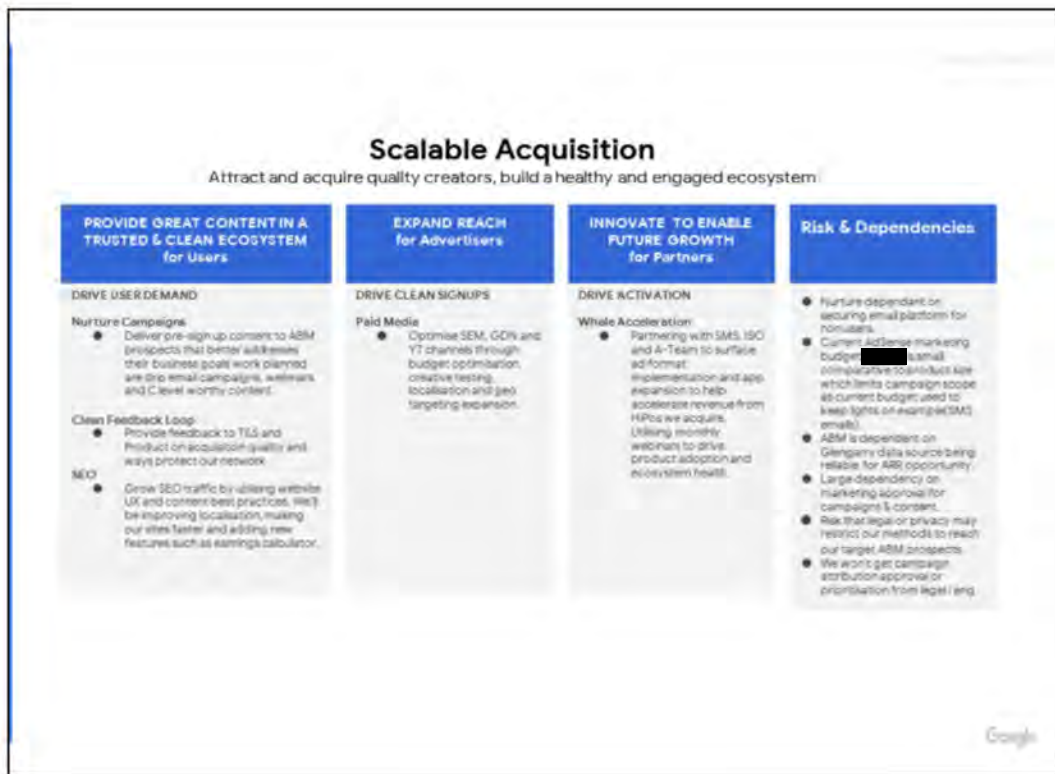
Scalable communications through SMS channels with targeted segmented messaging will be the main focus in driving all other priorities.



Source: AWS 2021 bottoms up

Google





- Goal: Drive X incremental traffic, X Leads and X revenue from Nature & SEO.
- Goal: Drive X sign ups and \$X revenue.
- Goal: Drive \$7M ARR uplift on HiPO sign ups.

SA Plan to hit revenue targets by focusing on the next phase of account based marketing (Nurture) and Whale Acceleration for App

We will also make adjustments to focus on clean revenue & 365 day ARR

New SA Programs in 2021		Operational Changes in 2021	
<div style="background-color: #2e7d32; color: white; text-align: center; padding: 5px; margin-bottom: 10px;">Nurture Program</div> <p>Purpose: SA pursued an ABM strategy in 2020 promoting "sign up" as it's core message and reached 32% of the ABM list with this message. We saw strong results from sign ups with higher ARPU and cleaner revenue but our sign up rate was 7% of users seeing our message, creating an account and activating. We think we can do a better job at cultivating our message and building a longer term relationship with prospects to increase the sign up rate.</p> <p>Overview: We'll create targeted ABM campaigns with messaging on how to solve their business challenges. We will offer users high value content, webinars, online events or offer incentives. Each of these will be followed with a drip email sequence to build long term relationships with the prospective publishers/developers.</p> <p>Impact: If we can increase our ABM sign up rate from 7% to 1.5% we'll drive \$55M ARR.</p>	<div style="background-color: #2e7d32; color: white; text-align: center; padding: 5px; margin-bottom: 10px;">Whale Acceleration</div> <p>Purpose: We observed that SA App activated whales are smaller than 2019. This presents an opportunity to help publishers as they seek insights directly from Google when expanding and implementing new ad formats.</p> <p>Overview: We predict there will be ~2942 unmanaged accounts identified as HPO activated next year with potential to grow by adopting new ad formats and expanding ad density of current formats.</p> <p>We plan to work with SMS and ISO to drive 1:1 sales calls for format expansion and app portfolio growth while hosting monthly webinars targeting.</p> <p>Impact: \$11M ARR uplift, +10% Ad Format expansion and adoption</p>	<div style="background-color: #0070c0; color: white; text-align: center; padding: 5px; margin-bottom: 10px;">Revenue Reporting</div> <p style="text-align: center;">1</p> <p>We'll report on clean revenue (name TBD). This is so that we're focused on the right metrics and giving the business the most accurate view of our acquisition performance.</p> <p style="text-align: center;">2</p> <p>We'll also begin to report 365 day ARR to better align with our ISO colleagues and better understand SA's impact on the overall business for a full year as well as in year captured.</p>	<div style="background-color: #0070c0; color: white; text-align: center; padding: 5px; margin-bottom: 10px;">FastTrack Changes</div> <p>FastTrack will become a global centralized lead scrubbing team based in APAC, enabling efficiency, drive the One Acquisition strategy and reach 100% coverage of HPO leads in 2021. We're going from 7 to 3 TVC's focused on lead scrubbing and 1 TVC on onboarding and acceleration.</p> <div style="background-color: #2e7d32; color: white; text-align: center; padding: 5px; margin-top: 10px;">DEI</div> <p>SA will put a renewed focus on promoting inclusion and diversity in our marketing campaigns, case studies, website, videos and content.</p>

Scalable Marketing Solutions


Our fundamental purpose is to serve as OPG's leading Center of Excellence for all things scaled

PROVIDE GREAT CONTENT IN A TRUSTED & CLEAN ECOSYSTEM for Users	EXPAND REACH for Advertisers	INNOVATE TO ENABLE FUTURE GROWTH for Partners	Risk & Dependencies
<ul style="list-style-type: none"> ● Tailored, timely, data-driven comms with continuous content enhancements to educate partners on ecosystem topics such as privacy, clean inventory, and ad implementations while having a closed feedback loop with publishers. □ AdMob app-ads.txt, ad implementation, AdMobReferrer policies □ AdSense: invalid traffic, confirmed clicks, policy comms □ Ad Manager: privacy regulations, Funding Choices, Ad blocking 	<ul style="list-style-type: none"> ● Drive product feature adoption and optimization implementations through targeted and timely campaigns such as awareness of on-platform features for apps and web. ● Reachability initiatives to expand SMS BoB 	<ul style="list-style-type: none"> ● X-OPG scaled comms, focusing on key initiatives like Multi-touch and Scaled comms strategy through all channels. ● Reach and grow even more partners through existing and new channels. ● Product & OPG signal and infrastructure alignment. 	<ul style="list-style-type: none"> ● Ongoing alignment and collaboration with upstream stakeholders in Product, Marketing, Legal, PSL, GTM teams to ensure comms calendar can be forward looking and aligned with feature launches. ● Strengthen core SMS infrastructure such as signal accuracy and best-in-class CRM to stay nimble and evolve with partners' evolving needs.

Google

Scalable Marketing Solutions

Our fundamental purpose is to serve as OPG's leading Center of Excellence for all things scaled




2020 EOY Summary

How did we do?

SMS finished the year at \$XB Overall Reachable BoB (X% vs target, +X% YoY). Web drove \$XM and Apps drove \$XM incremental implemented ARR in 2020.

Alongside new email campaigns, global SMS considerable inroads expanding to new channels, including YouTube (X videos produced in 2020) and Gather (X webinars hosted). We also made great progress expanding into ecosystem health (Top Dropper), scaling project Purple success, and pioneering coordinated multi-touch initiatives.




Our 2021 Pillars

What's next?

SMS Web will own XB (X% y/y) and Apps XB (X% y/y). To deliver against these targets, we formulated three core pillars:

- 1. Reachability**
Grow our pool of opted-in users across channels to deliver the right message at the right time.
- 2. Proactive and Intelligent Comms**
Engage partners with targeted, personalized comms at every stage of the publisher journey.
- 3. Efficiency through Data**
Achieve greater insights and automation through improved reporting and tracking infrastructure.



How do we get there?

What's different in 2021?

To pull off this new strategy, SMS is making two big changes:

- 1. Scalable comms** PgM and deeper subject matter experts (SMEs)
Alignment on webinar topics for global OPG with deeper content expertise and improved proactiveness with our Internal CoE processes and building trust with our stakeholders as we move into 2021.
- 2. Intelligent scaled pipeline approach**
Improving scaled and 1:1 sales coordination and alignment by leveraging our data insights and delivering a scaled content strategy across channels.








A-Team: What are we doing differently in 2021?

Context & Strategy	<p>In 2021 OPO SMBP will mature into a [REDACTED] (12% Y/Y) business and the A-Team will continue to manage ~50% of that revenue via a hybrid approach of 1:1 and scaled interactions (*estimated target)</p> <ul style="list-style-type: none"> ● Apps: Focus on going deeper with top opportunities/rising apps via strategic initiatives such as SCRs, UX consultation, and onboarding on Platform ● Web: Double down on scaled initiatives to maximize the opportunity focused on sustaining revenue and increasing reach; minimum high touch impact only on top rev deals and Ad Manager optimization
Success Metrics	<ul style="list-style-type: none"> ● Implemented Deal Value ● Unique partners pitched & optimized ● Revenue touched/optimized at scale <p>In 2021, the team will be factoring in for two new M1 metrics to ensure that we are set for the right model to capture both depth (top accounts rev) and breadth (maximizing optimization for unique partners)</p>
Operational Excellence	<ul style="list-style-type: none"> ● Multi-touch initiatives: Doubling down as one SMBP team where A-team members will be unlocking the opportunity via coordinated sales; minimizing 1:1 efforts on low complex opportunities (solving for unified messaging to the customer, efficiency, signal improvement) ● Scaled webinars: A-team AMs will only be hosting the webinars for respective languages; efficiency gains via support from SMS w.r.t event logistics and content creation ● OE lead/region: To help with global alignment on OE metrics, improved OE metrics Q/Q, weekly sales activities, etc. Drive automation based on trends to increase reach (ex: account based marketing in collaboration with SMS)
In-Decision (WIP)	<ul style="list-style-type: none"> ● Increased reachability for top partners: Additional PDR support/TVC request to help AMs reach out to top rev partners who are currently non-contactable ● Scaled Tracking: Support required to ensure the team is able to track the impact of scaled activities (Project Purple)



Id	Date	Text
2	12/16/2020 11:05:02	@prateekbajaj@google.com
3	12/16/2020 11:07:42	My sense is that it may reduce slightly from 50%. As EMEA web is significant.
3	12/17/2020 01:26:49	Is this still the case removing A-team Web EMEA? (Another curiosity question, not essential to answer now if info not readily available)
1	12/17/2020 01:26:49	@niamhdonagh @ajayluther@google.com : I will be working with PI in early Jan to revisit the number, yes it will be reducing with the change in EMEA web. Hence, not closing the comment, will update the same once Q1 BoBs are built.
		



Partner Experience

PX moves forward to create effortless support environment that empower partners and sustain excellent user experience

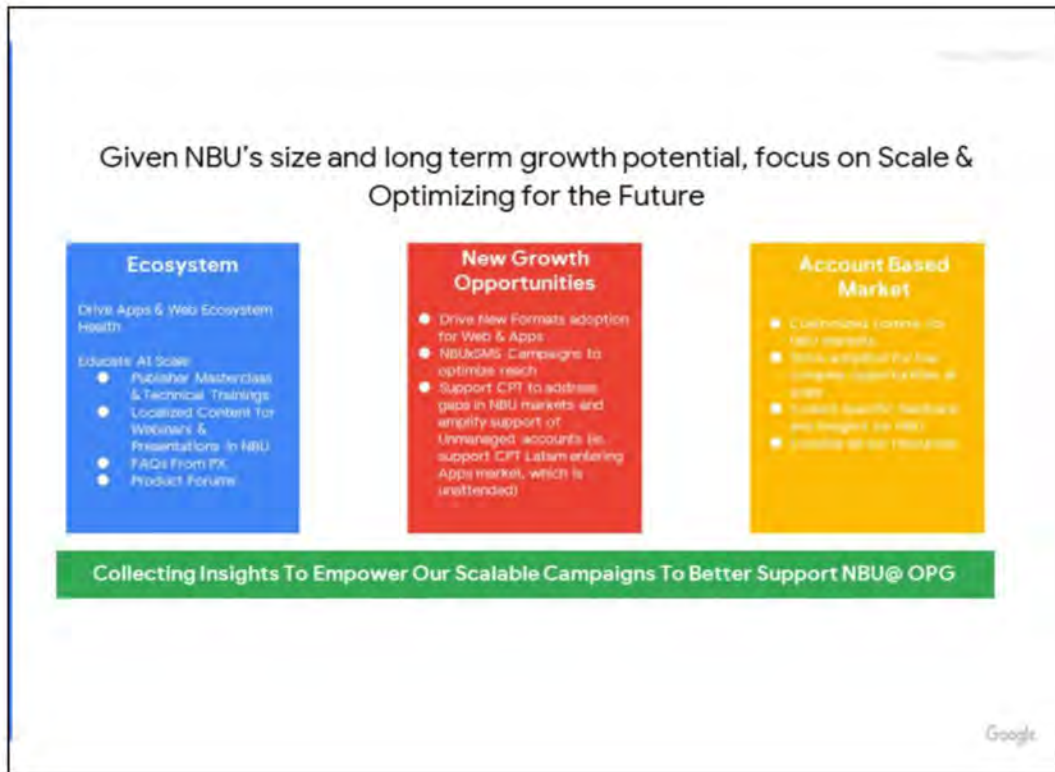
What we focused in 2020	How 2021 will look like
<p>Focus on 1:1 support operational excellence. Global PX engaged with 10K unique number of publishers.</p> <ul style="list-style-type: none">● Providing 1:1 support to +13K cases globally.● Delivering 88.1% tCsat and 77.3% TRT with +5.1% YoY growth in case volume.● Touched publishers with \$2.17B in ARR.● Quality Assurance launch ensured the operational excellence across the markets for all 1:1 interactions with publishers with +80% quality score from all regions.● Automated cases are projected to save 1.6 FTE time with cases robot designed for BRITA (site approval) and AdSpam issue categories.	<p>PX CSR Role will continue to evolve in 2021:</p> <ul style="list-style-type: none">● 40% (reduction from 50% in 2020) allocation to core work, which includes 1:1 external reactive 1:1 support, support to High potential publishers and enhanced Sales & PX cooperation (SWP/Rising Apps/T1 Ad Manager Pilot)● 60% allocation to strategic initiatives <p>PX commits to drive innovative solutions focus on Automation & Proactiveness and Brand Loyalty while ensuring Publisher Experience through all platforms.</p> <ol style="list-style-type: none">1. Automation & Efficiency1. Platform Experience Enhancement1. Proactive Partner Enablement <p>PX vision is to create effortless support environment that empowers partners. We will anticipate and provide effective solutions to partners through all scalable platforms as Subject Matter Experts & Platform Leads.</p>





- 11% of NBU Revenue is considered "Dirty"
- Quality Terminated Revenue in NBU regions represents a larger share (50% vs. FBU 30%)
- Low Connectivity is a common challenge within NBU regions, resulting in 25-30% of Apps sessions being offline
- Lack of technical expertise and lack of content available in all languages result in stronger reliance on Publisher-to-Publisher education.

Id	Date	Text
3	12/16/2020 07:17:30	Requires further discussion to clarify clear focus areas and goals. <small>Proprietary + Confidential</small>



- 1) Opportunity Sizing
 - 2) Focus Areas for NBU in 2021
 - 3) How do we plan to get there. (Collecting insights , more localised support, customised comms, easier optimization for partners, automated solutions.
- Given NBU's size and long term growth potential, focus on Scale & Optimizing for the Future to drive \$1.86M
(NBU contributing to 20% of OPG Growth)

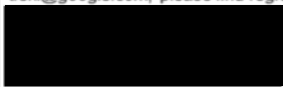


As you just saw, it was not easy for them to start a website, they faced several challenges but they never gave up! Thanks to their effort 5000 people in a small village in India can now access the world's information.

Stories like Sushant's are what really keeps our team going. Whether we're helping publishers through our products, programmes, or teaching them about user experiences, I like to know that we're helping the everyday person.

OPG Pillars	Strategic Focus Areas	Owners	Sponsors	Mid Quarter Update
Ecosystem	Ecosystem Health (Apps/Web)	jocada@, @ajay/utner	Jocao	Apps: ABH Score at 30.7 (95.4% attr), substantially below target on sellers (51% attr). Email campaign for Q214 and sellers (50% in production, as well as SA-led monthly webinar. T1 activities also a priority for both components.
Systemic Reach	Drive On Platform Rev Scale Open Bidding Defend On Platform Revenue	prateekbajaj@, zucchini@, krod@	Jason	On-platform rev: 121.4% to target Non-waterfall adoption: 58.5% (102% to target) OB activations: 67 partners onboarded \$38.7M AdS Note: All proactive OB pinging on pause pending legal PR advice. Outlook may miss goal in Q2 if no proactive T1 push resumes
Investate To Engage Partner Ecosystem	Accelerate New Format Adoption Rising Apps Scaling AdSense Automation Firebase H5 Gaming	mishe@, ericasetti@ trilivacy@ darynach@ kimatsumoto@ julianabao@	Jill	Accel New Formats: Appopen ads multi-touch campaign launched 1/12 with a final team of S&S and PSL marketing teams to create webinar deck and email content. QTD 2406 APPs adopted with touched \$44M ARR (baseline 1015 partners, \$24.9M ARR as of 1/12). Rewarded interstitial campaign scheduled 2/24. Q2 priority will be to promote a new format, such as full screen native ads or conduct a second round campaign for app open ads and reward interstitials along with new approaches / content. Rising Apps: Global targets and campaigns complete. The new Scaled Pipeline has been launched for SPH engagement. Global brainstorm session consolidation being added to workstream.
	Multi-Touch Acquire Nurture Prospects with ABM Scale For OPG	vanvuong@, darynach@, alexmacintyre@ sdunleavy@ / bernaagar@ / scarlett@ vanvuong@, darynach@, ggrimes@		Scaled Pipeline: First version of Scaled Pipeline released for AdMob and AdSense including in-depth User Guide . Deep-dive video available for Auto Ads AdSense. Nurture Prospects ABM: Due to the big success of LinkedIn campaign in Q420, we've launched LinkedIn again this quarter to 75K web ABM prospects, which is 8% more pubs compared to Q4. Development of Apps Humlist is underway whilst web has secured budget for content creation with 2 lead gen assets for web, 1 for apps.

Expand Reach > Platform > Scale OB: OB onboarding guide externally sharareble and ready for Open Beta launch. ETA: March
Defend OB: working with PSL to use Healthscore dash signals to build scalable campaign

Id	Date	Text
4	02/17/2021 06:46:12	One Update Per Pillar Proprietary + Confidential
8	02/18/2021 03:18:31	@ktersini@google.com _Assigned to Kaylee Menalis_
1	02/18/2021 04:53:05	added
6	02/18/2021 07:55:40	@dairine@google.com - FYI _Reassigned to Dairine Kennedy_
1	02/18/2021 08:20:56	@sdunleavy@google.com can you add update on ABM @bernaagar@google.com @darynach@google.com to update on the adsense 3 part scaled pilot
2	02/18/2021 08:34:10	@ajayluther@google.com @darynach@google.com the information here and below will be very similar for AdSense - dasha can you add our 3 part scaled pilot for auto ads and ajay you can decide if we should just remove scaling adsense automation from this section as we will be calling out the same work twice
9	02/18/2021 08:34:10	Yes, I will clean it up once everyone has entered it.
1	02/18/2021 09:55:18	LGTM! Are you ok with having WIP initiatives (onboarding guide / scalable campaign)?
1	02/18/2021 11:04:51	thanks Prateek.
2	02/18/2021 11:05:27	_Marked as resolved_
3	02/18/2021 11:07:28	_Re-opened_ @prateekbajaj@google.com Do we have the data OB activations by region? it's nice to have but not a must. thanks.
4	02/18/2021 14:13:22	tienl@google.com; please find regional level breakdown here: 
3	02/18/2021 14:49:58	@tienl@google.com @ajayluther@google.com @krod@google.com @zucchi@google.com for your review.

Appendix

Google

A-Team- Revenue & Activities /FTE

Incremental Revenue (IDV)/FTE

	Current FTE		Should be Meeting FTE	
	Apps	Web	Apps	Web
AMS			\$3,466,506	\$5,353,942
APAC			\$13,482,798	\$17,546,562
EMEA			\$5,492,924	\$4,970,650
Global (Avg)			\$6,730,486	\$8,306,274

Pitches/FTE

	Current FTE		Should be Meeting FTE	
	Apps	Web	Apps	Web
AMS	365	322	475	440
APAC	704	498	792	581
EMEA	433	412	506	549
Global (Avg)	489	384	566	502

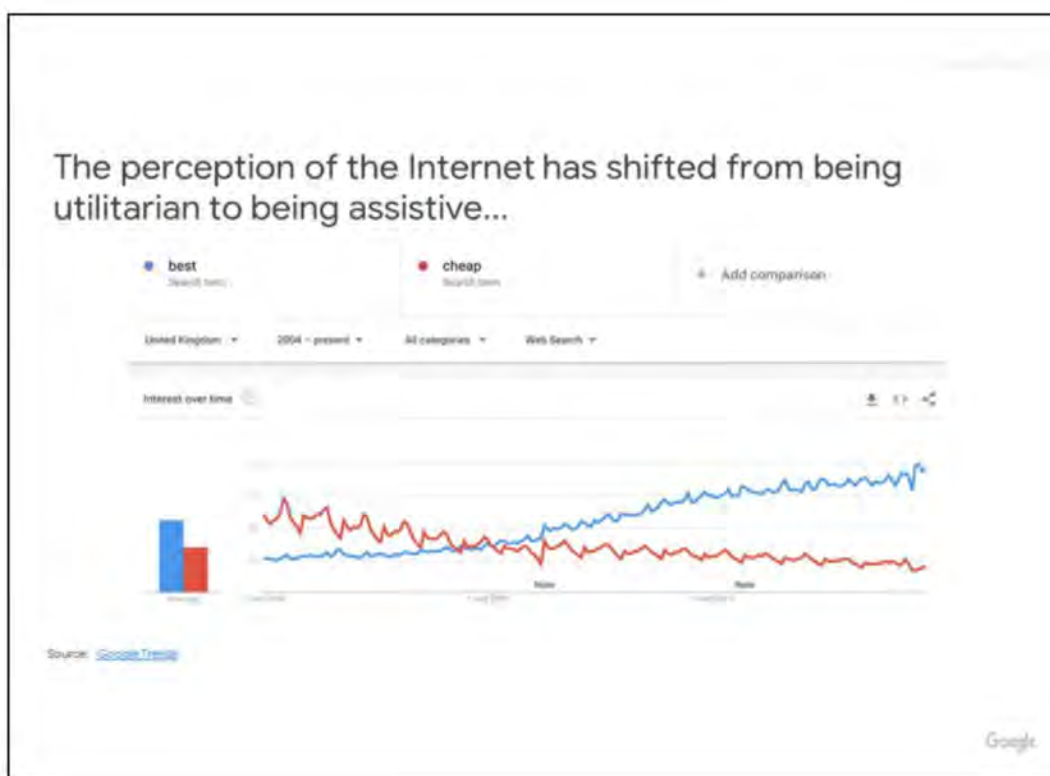
Touched Revenue/FTE

	Current FTE		Should be Meeting FTE	
	Apps	Web	Apps	Web
AMS			\$22,068,366	\$48,384,414
APAC			\$100,363,602	\$80,806,259
EMEA			\$30,926,786	\$35,125,990
Global (Avg)			\$44,964,083	\$53,175,254

Optis/FTE

	Current FTE		Should be Meeting FTE	
	Apps	Web	Apps	Web
AMS	132	135	171	185
APAC	228	261	257	304
EMEA	94	138	109	184
Global (Avg)	140	164	169	214

Google



SMBP 2021: Industry and market trends

The arrival of new formats & Automation has led to a renewed definition of **Publishers & Content Creation**

AdSense trends	Industry trends
<ul style="list-style-type: none"> Internet user growth continues to be driven by APAC, Africa and the Middle East. ~58% (4.5bn) of the global population is now online (total 7.5bn); 52% of APAC and 72% of Africa is not online. AdSense For Platforms (Tistory) has unlocked new acquisition opportunity in markets like Korea leading to more than 75% of the total activations in H1, 2020. Global Web usage continues to decline as more users flock to walled gardens for a better experience. The access points have changed drastically from search/intent-driven to feed/recommendation-driven models. Partners with deeper understanding of their audience, UX and clear investment strategy have remained sustainable through COVID. 35% of AdMob revenue is from apps released within one year; Top charts is getting concentrated with recently released apps from fewer Pubs. 	<ul style="list-style-type: none"> Hyper-Casual game installs more than doubled during COVID lockdowns globally. Hyper-casual gamers are keen to <u>experience deeper social mechanics</u> in these games. Overall gaming installs increased by 70% y/y. App downloads are at an all-time high but diminished purchasing power has halted IAP, making ads still the most viable option. Rewarded and in-game audio ads are the most preferred formats by users. More SMB partners are now interested in testing OB post FAN's recent switch to exclusive RTB. Though this presents an opportunity of \$1.47B across 40k+ accounts, there are challenges to capturing this at scale. [Details] <u>Privacy & Identity:</u> Platforms, such as browsers and iOS recently, are reducing access to common identifiers that have been widely utilized by the ads industry for ads monetization.

Web

Google

Combining regulatory environment challenges and ecosystem health?
 Web: Number of websites is stable, growing through NBU,

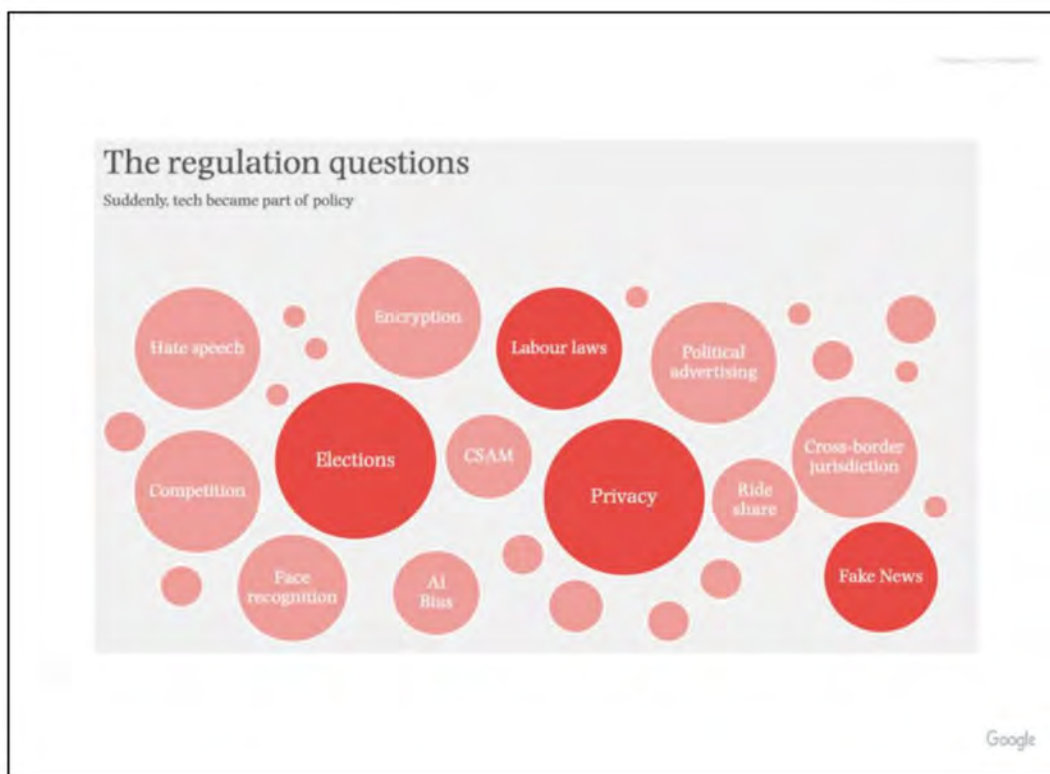
SMBP web 2020: Industry and market trends

2020 has been a year like no other that impacted users, advertisers and publishers in different ways. General economic downturn, tightening privacy and data sharing environment as well as flat web growth are main factors.

User	Ads environment
<ul style="list-style-type: none"> Internet user growth continues to be driven by APAC, Africa and the Middle East. ~58% (4.5bn) of the global population is now online (total 7.8bn); 52% of APAC and 72% of Africa is not online (Statista). Smartphone time increased during the pandemic with >90% of time spent on apps. Mobile app downloads reached an all time high, +40% YoY in Q2 '20. Non-gaming apps represented over half (55%) of the new downloads on Android and 70% of those on iOS (emarketer). People switched their information consumption from search triggered to feed/recommendation suggested with preference to social media channels and video (Source: Global Audi Lockbox (7/1) excluding launchers & OEM apps (dialers, etc) - slide 27). 	<ul style="list-style-type: none"> Tightening data usage environment Regulation: In 2020 we saw a number of regulatory changes come into effect. They include CCPA (July 2020), LGPD in Brazil (August 2020), and the launch of IAB TCFv2.0. Privacy & Identity: Platforms, such as browsers and iOS recently, are reducing access to common identifiers that have been widely utilized by the ads industry for ads monetization. Total global ad spend is expected to come in at \$615 billion in 2020 (-4.9% YoY vs +6.3% YoY in 2019). Digital is estimated to represent 54% of the total or \$332 billion, growing at 2.4% YoY vs 15.9% in 2019. (emarketer, Statista, internal). Travel and auto verticals were hit the most by Covid (XRP, and Connected Systems).

Google

Combining regulatory environment challenges and ecosystem health?
 Web: Number of websites is stable, growing through NBU,





APPS:

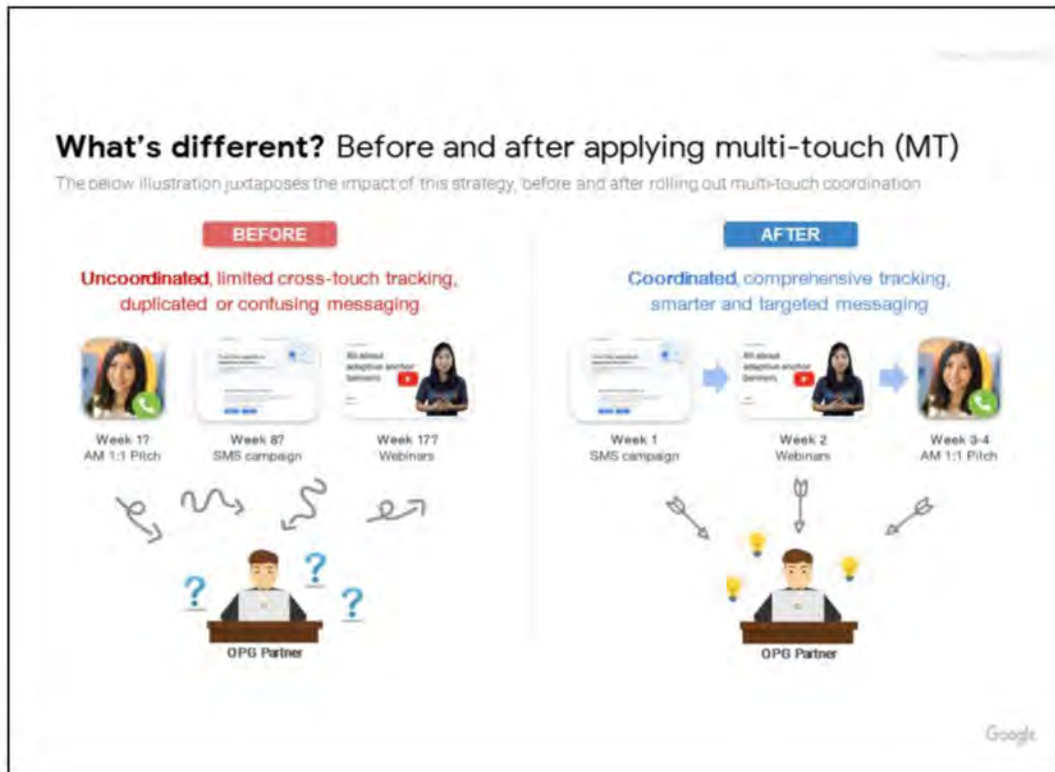
On the apps side, the risk log that Gabriel put together here is probably a good place to start: https://docs.google.com/spreadsheets/d/13isyzP-H-tIK3Xh-dj-eT2w-muEoN7sQ1cB_DxK0GW0/edit#gid=384532715

I'd specifically call out the challenges around app ecosystem health, the risk of IDFA going away, and tailwinds around new formats and use of Rewarded beyond Gaming (for Apps and Web).

WEB

here is web risk

[log.https://docs.google.com/spreadsheets/d/1aXvDtRwUb3lV0ZBTopYqIWx04LsoiMjaMd-mvJfk81R8/edit#gid=384532715](https://docs.google.com/spreadsheets/d/1aXvDtRwUb3lV0ZBTopYqIWx04LsoiMjaMd-mvJfk81R8/edit#gid=384532715)



Here's how we're going to work together

A-TEAM

THE WHAT	ACTIVITIES	OWNER(S)
A-Team Regional Leads Alignment	<ul style="list-style-type: none"> • Will meet bi-monthly to align on team progress, metrics, product, people, and strategies across teams and apps • Ensure streamlining/replication of scalable activities wherever possible through sharing best practice • EMEA/AMS, EMEA/APAC 	A-team Managers (APAC: Tony, EMEA: Fatma, Prasanna, LATAM: Ali, US/CA: Jill, Kaylee, Nate)
PI Prioritization	<ul style="list-style-type: none"> • Funnel requests, asks, projects through quarterly prioritization process (A-team POC in US/CA) and share globally 	Pillar & Initiative Leads Ayya for PI
Top Deals	<ul style="list-style-type: none"> • Regional teams are accountable for top 5 deals in region, thresholds set by region • x-SMBP updates are provided in weekly SCRUM sessions for improved communication/collab • M2 target to drive impact at the top of 11 	Global Optimization Specialists

Google

Top 15 = 40% of revenue

- Leverage pubmail to identify how to scale reactive work
- Increase tool utilization of AskAnnie, CTP

Here's how we're going to work together

SA

THE WHAT	ACTIVITIES	OWNER(S)
SA Regional Leads Alignment	<ul style="list-style-type: none"> • Will meet bi-monthly to align on team progress, metrics, product, people, and strategies across web and apps • Ensure streamlining/replication of scalable activities wherever possible through sharing best practice • EMEA/AMS, EMEA/APAC 	SA Managers (APAC/Jason, EMEA/ Darine US/CA/Israel)
Product & T&S Prioritization	<ul style="list-style-type: none"> • Funnel requests through Global SA product owners, asks, projects through quarterly prioritization process, and share globally 	Pillar & initiative Leads
SA pillars	<ul style="list-style-type: none"> • Drive demand (website, social, video) • Drive sign ups • Drive activations & acceleration • Drive clean revenue 	Global SA Program Managers

Google

Top 15 = 40% of revenue

- Leverage pubmail to identify how to scale reactive work
- Increase tool utilization of AskAnnie, CTP

Here's how we're going to work together

SMS

THE WHAT	ACTIVITIES	OWNER(S)
SMS Regional Leads Alignment	<ul style="list-style-type: none"> • Will meet bi-monthly to align on team progress, metrics, product, people, and strategies across web and app • Ensure streamlining/replication of scalable activities wherever possible through sharing best practice • EMEA/AMS, EMEA/APAC 	SA Managers (APAC:Joao, EMEA: Darine US/CA: Loren)
X-OPQ collaboration	<ul style="list-style-type: none"> • Support SA rewrite onboarding and with with A-team & Fasttrack for acceleration for fast ramp • Work With PX on proactive sends to lower volumes 	Pillar & initiative Leads
SMS pillars	<ul style="list-style-type: none"> • Drive reachability • Drive adoption • Drive education & empowerment 	Global BMA Campaign Managers

Cloud

Top 15 = 40% of revenue

- Leverage pubmail to identify how to scale reactive work
- Increase tool utilization of AskAnnie, CTP

Here's how we're going to work together

PX

THE WHAT	ACTIVITIES	OWNER(S)
PX Regional Leads Alignment	<ul style="list-style-type: none"> • Will meet bi-weekly to align on team progress, metrics, product, people, and strategies across wins and apps • Ensure streamlining/replication of scalable activities wherever possible through sharing best practice • EMEA/AMS, EMEA/APAC, APAC/AMS 	<ul style="list-style-type: none"> • PX Managers (APAC: Joao/Jia; EMEA: Claire/Alice; AMS: Erika)
PX Filters	<ul style="list-style-type: none"> • Core Work Excellence • Automation & Efficiency • Experience Enhancement 	<ul style="list-style-type: none"> • PX managers / Initiative leads
PX Enablers	<ul style="list-style-type: none"> • RPT/PTS resources to develop strategic tools/APIs to improve support efficiency • Shared OKRs w/ Internal teams(PSL, product, T&S, S&S...) to ensure customer experience 	<ul style="list-style-type: none"> • PX managers / SMEs

Cloud

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